



Management and Leadership

National Occupational Standards (NOS)

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Unit 3 Cherry Hall Road
North Kettering Business Park
Kettering, NN14 1UE
T: 01536 739 189
E: skills@instructus.org
www.instructus-skills.org

URN	NOS Title
INSML001	Manage yourself to achieve your work and personal objectives
INSML002	Develop your knowledge, skills and competence to meet the requirements of your work
INSML003	Develop and maintain your professional connections
INSML004	Lead your organisation
INSML005	Provide leadership to your team
INSML006	Evaluate your organisation's operating environment
INSML007	Develop your organisation's vision, strategies and business plans
INSML008	Promote equality of opportunity, diversity and inclusion in your organisation
INSML009	Develop your organisation's values and culture
INSML010	Develop operational plans and manage risks
INSML011	Develop, maintain and evaluate business continuity plans and arrangements
INSML012	Manage Corporate Social Responsibility (CSR)
INSML013	Ensure compliance with legal, regulatory, ethical and social requirements
INSML014	Use information for decision making
INSML015	Identify and evaluate opportunities for innovation and improvement
INSML016	Plan change in your work environment
INSML017	Implement and evaluate change
INSML018	Manage continuous improvement of overall performance of your organisation
INSML019	Plan the workforce
INSML020	Recruit, induct and retain employees into their roles
INSML021	Manage the redeployment of employees to new roles
INSML022	Manage redundancies
INSML023	Follow your organisation's disciplinary and grievance procedures
INSML024	Build teams and allocate work to team members
INSML025	Manage and quality assure work in your team

INSML026	Manage team communications
INSML027	Manage flexible and remote working arrangements
INSML028	Promote and manage staff wellbeing
INSML029	Support employees' learning and development
INSML030	Coach or mentor employees
INSML031	Develop and sustain working relationships with colleagues and stakeholders
INSML032	Develop and sustain collaborative relationships with departments and other organisations
INSML033	Manage conflicts in work environment
INSML034	Lead meetings to achieve objectives
INSML035	Identify and justify requirements for financial resources
INSML036	Manage financial resources
INSML037	Manage budgets
INSML038	Manage physical resources
INSML039	Manage the environmental and social impacts of your work
INSML040	Optimise the use of technologies
INSML041	Manage information, knowledge and communication systems
INSML042	Develop knowledge and communicate information
INSML043	Implement and evaluate strategic and operational business plans
INSML044	Manage business processes
INSML045	Manage programmes of work or projects
INSML046	Develop and implement marketing plans
INSML047	Plan and monitor the work of sales teams
INSML048	Bid for contracts to supply products and services
INSML049	Sell products and services
INSML050	Develop a customer-focused organisation
INSML051	Deliver products and services to customers
INSML052	Manage customer service
INSML053	Manage quality assurance systems

INSML054	Carry out and participate in quality audits
INSML055	Provide healthy, safe and secure working environments and practices
INSML056	Produce and procure products and services from external suppliers
INSML057	Select suppliers through a tendering process
INSML058	Outsource business processes

Manage yourself to achieve your work and personal objectives

Overview

This standard is about managing yourself to achieve your work and personal objectives. You develop objectives to achieve your organisation's vision and objectives in line with its values. You identify your priorities and focus your time and resources to achieve them. You also assess your own values, motivations and aspirations against your organisation's vision, objectives and values to align and manage conflicts. You recognise and manage your emotions and emotions of your colleagues, mental health and wellbeing, responding to new opportunities and urgent situations with positivity, energy and focus. You use emotional intelligence to discern between feelings, collate relevant information to guide your judgement, decision-making and adapt to the working environment to achieve your work and personal objectives.

This standard is for all managers and leaders.

Manage yourself to achieve your work and personal objectives

Performance criteria

You must be able to:

1. define the key purpose of your work role
2. identify how your role contributes to achieving your organisation's vision and objectives
3. identify how your role relates to other roles in the organisation and where there are opportunities for joint working and mutual support
4. develop personal objectives which are compatible with the vision, objectives and values of your organisation
5. prioritise objectives and plan work to make best use of available time and resources
6. assess your own values, motivations and aspirations
7. evaluate your organisation's vision, objectives and values against your own values, motivations and aspirations to identify alignment and conflicts
8. plan methods to maximise alignment and resolve the personal or organisational conflicts
9. agree and prioritise your objectives with members of staff you report to
10. monitor your progress and achievements against objectives and deadlines
11. manage your time to achieve objectives within agreed deadlines
12. delegate responsibilities to colleagues to ensure that deadlines are met
13. use the relevant technologies to help you achieve your objectives
14. identify and remove distractions and activities that do not help achieve your objectives
15. monitor changes to your organisation's objectives, processes, systems and structures
16. identify how changes to the organisation's objectives, processes, systems and structures impact on your role
17. identify new work opportunities as they arise
18. respond quickly and positively to new opportunities and revise your objectives and priorities
19. identify urgent situations that arise during work activities
20. respond quickly and positively to urgent situations when they arise, revising your objectives and priorities as necessary
21. maintain your wellbeing through self-reflection when working towards achievement of your objectives
22. use emotional intelligence to recognise and evaluate your own

- and your colleagues' strengths and weaknesses, feelings, opinions and judgements
23. manage your relationships with colleagues and customers to achieve your objectives
 24. request regular objective, specific and valid feedback on your performance from colleagues and customers
 25. monitor progress towards your objectives
 26. seek new sources of support and feedback, when necessary
 27. evaluate the achievement of your objectives with members of staff you report to
 28. agree changes to your objectives with those you report to, based on your performance, feedback received or changes in organisational priorities
 29. take actions to maintain balance between your professional and personal life, when required

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to identify the requirements of your work role
2. how to gather and validate information
3. how to analyse your work role and how it relates to other roles in the organisation.
4. the ways that you can assess your own values, motivations and aspirations
5. the importance of balancing personal values, motivations and aspirations with organisational vision, objectives and values
6. how to evaluate the impact of different factors on your role
7. the importance of managing your knowledge, understanding and skills
8. how to set work objectives which are Specific, Measurable, Achievable, Realistic and Time-bound (SMART)
9. the ways to measure progress against your work objectives
10. how to monitor changes, trends and developments and revise objectives to incorporate them
11. the techniques for managing emotions, mental health and wellbeing
12. the methods for gathering feedback on your performance
13. how to make effective use of performance feedback
14. how to update work objectives based on your performance, feedback received or changes in organisational priorities
15. how to track time management and identify possible improvements
16. how to address multiple demands with focus and energy

Industry and sector specific knowledge and understanding

17. the industry and sector requirements for the development and maintenance of knowledge, skills and competence
18. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

19. the colleagues and team members within your area of work, their roles, responsibilities, competences and potential
20. your organisation's business processes
21. your organisation's objectives

Manage yourself to achieve your work and personal objectives

22. the agreed requirements of your work role including the limits of your responsibilities
23. your agreed personal work objectives
24. your organisation's structure and reporting lines
25. your own your own and your colleagues' strengths and weaknesses, feelings, opinions and judgements
26. your own values, motivations and aspirations
27. the importance of emotional intelligence in the workplace
28. your own emotions and the effect these have on your own actions and colleagues
29. the sources of performance feedback in your organisation

Manage yourself to achieve your work and personal objectives

Skills

1. Communicating
2. Evaluating
3. Empathy
4. Motivation
5. Obtaining feedback
6. Managing self
7. Personal resilience
8. Planning
9. Prioritising
10. Reviewing
11. Self-assessment
12. Self-reflection
13. Self-awareness
14. Setting objectives
15. Time management

Manage yourself to achieve your work and personal objectives

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Keywords	Management & leadership; manage yourself
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Overview

This standard is about developing your own knowledge, skills and competence to meet the current and future requirements of your work. You monitor trends in your professional sector and area of expertise to support your personal and career development. You identify gaps in your knowledge, skills and competence; then plan and undertake learning and development activities to improve your performance. You regularly seek feedback and action it accordingly.

This standard is for all managers and leaders.

Performance criteria

- You must be able to:*
1. monitor trends and developments in your professional sector and area of expertise
 2. evaluate the impact of trends and developments on your work role
 3. assess the current and future requirements of your work role in accordance with the vision and objectives of your organisation
 4. identify gaps between the current and future requirements of your work role and your current knowledge, skills and competence.
 5. assess your own values, motivations and emotions
 6. identify your own strengths and limitations
 7. identify your learning and development needs
 8. agree a development plan which addresses identified gaps in your knowledge, skills and competence
 9. agree a development plan which supports your own career and personal goals
 10. undertake the activities agreed in your development plan using preferred learning methods
 11. seek new sources of support, when necessary
 12. access available learning and development resources to support development activities
 13. evaluate how learning and development activities have contributed to your performance
 14. request objective, specific and valid feedback on your performance from colleagues, team members and customers
 15. collate and analyse the feedback and take appropriate actions, where required
 16. update your development plan in the light of your performance, development activities undertaken and any wider changes
 17. reflect on your learning and work experiences in your continuing professional development (CPD) records

Develop your knowledge, skills and competence to meet the requirements of your work

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to evaluate the current requirements of a work role and how these requirements may evolve in the future
2. how to monitor changes, trends and developments in your professional sector
3. how to identify learning and development needs
4. how to address any identified gaps between the requirements of your work role and your current knowledge, understanding and skills
5. the key components of a personal development plan
6. the importance of taking account of your career and personal goals when planning your professional development
7. the different learning methods available and how to identify the methods of learning
8. the types of development activities that can be undertaken to address identified gaps in your knowledge, skills and competence
9. how to evaluate the extent to which development activities have contributed to your performance
10. how to update development plans in the light of your performance, any development activities and any wider changes
11. how to identify sources of feedback on your performance

Industry and sector specific knowledge and understanding

12. the industry and sector requirements for development or maintenance of your knowledge, skills and competence
13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

14. your responsibilities for developing knowledge, skills and competence
15. the development opportunities and learning resources in your organisation
16. your continuing professional development (CPD) records and why these need to be kept up-to-date
17. your organisation's policies and procedures for personal development

Develop your knowledge, skills and competence to meet the requirements of your work

Skills

1. Communicating
2. Evaluating
3. Learning
4. Managing self
5. Motivation of self
6. Obtaining feedback
7. Personal resilience
8. Personal and professional development
9. Planning
10. Reflecting
11. Reviewing
12. Role modelling
13. Self-assessment
14. Setting objectives

Develop your knowledge, skills and competence to meet the requirements of your work

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Develop and maintain your professional connections

Overview

This standard is about developing and maintaining your professional connections. You define objectives for networking activities, identify relevant professionals, stakeholders and organisations that can support your current and future work. You develop mutually beneficial relationships with your contacts, respecting confidentiality when sharing your own knowledge, skills and competence to support your colleagues and team members. You use the relevant digital technologies for engagement and communication with your professional connections and also follow organisational policies and procedures for sharing information and resources.

This standard is for all managers and leaders.

Develop and maintain your professional connections

Performance criteria

You must be able to:

1. define your objectives for collaboration with relevant professionals and stakeholders
2. identify contacts and organisations that support your current work and provide future opportunities
3. create professional networks of contacts which meet your current needs for information and resources
4. compare your own and your colleagues' expectations of professional relationships
5. identify preferred ways of communication with your networks of contacts
6. develop your professional connections to meet your current and future needs for information and resources
7. outline your knowledge, skills and competence with your professional connections
8. provide information about the benefits of collaboration with you
9. assess opportunities presented by your networks of contacts
10. maintain boundaries of confidentiality between yourself and your networks of contacts
11. agree guidelines for exchanging information and resources following your organisational policies
12. encourage your colleagues and team members to share information and knowledge in accordance with confidentiality
13. develop your professional connections in conjunction with your priorities and needs
14. select communication media channels and styles to suit different contacts and professional sectors
15. deliver your position and views where there are differing opinions
16. use the range of digital technologies for engagement, communication and maintaining your professional connections
17. use the information and resources gained through your professional networks to enhance your work
18. comply with legal requirements, industry regulations, organisational policies and professional codes of practice

Develop and maintain your professional connections

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the types of professional connections and their features
2. the benefits of connecting with stakeholders and organisations
3. the principles and methods of communication and how to apply them to engaging with professional connections
4. the different communication styles and how to identify individual preferences
5. the methods for developing mutually beneficial relationships with other professionals, stakeholders and organisations
6. how to respond to differences of opinion and deliver your position and views
7. the range of digital technologies for engagement, communication and maintaining your professional connections
8. when and how to use of the information and resources gained through professional networks
9. the principles of confidentiality and the legal and organisational policies
10. how to develop approaches for exchanging information between individuals and organisations

Industry and sector specific knowledge and understanding

11. the industry and sector requirements for the development and maintenance of knowledge, skills and competence
12. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

13. your own values, motivations and emotions, and the effect of these on your own actions
14. your own interests and how these may conflict with the interests of other professionals, stakeholders and organisations
15. your own objectives in developing your professional connections
16. your current and future needs for information and resources
17. the relevant professionals, stakeholders and organisations that can support your work, and vice versa
18. the information and resources that relevant professionals and stakeholders may need from you and your organisation

Develop and maintain your professional connections

19. the relevant professionals, stakeholders and organisations in your current professional connections

Develop and maintain your professional connections

Skills

1. Communicating
2. Influencing
3. Information management
4. Learning
5. Managing of self
6. Networking
7. Personal resilience
8. Persuading
9. Presenting information
10. Questioning
11. Risk management
12. Thinking strategically
13. Valuing individuals

Develop and maintain your professional connections

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Lead your organisation

Overview

This standard is about leading your organisation. You provide direction to colleagues and team members in your organisation by communicating and reinforcing your organisation's purpose, values and vision. You engage with external stakeholders and consider how your organisation impacts the environment, local community and society. You empower, inspire, motivate and support colleagues, team members to achieve your organisation's purpose and vision, reinforcing your organisation's values to build trust. You shadow other leaders and their style, regularly seek feedback on your performance and action it accordingly.

This standard is for all managers and leaders.

Lead your organisation

Performance criteria*You must be able to:*

1. define your organisation's direction by engaging with colleagues, team members and other stakeholders
2. assess and analyse current trends, opportunities and risks to your organisation
3. present the outcomes of your analysis to senior management representatives
4. facilitate discussions with senior management to secure commitment and expertise to achieving results
5. communicate and reinforce your organisation's purpose, values and vision across the organisation
6. communicate your organisation's purpose, values and vision to external stakeholders
7. evaluate the impact of your organisation on the environment, the local community and society
8. identify the benefits of your organisation's impact on the environment, local community and society
9. develop organisational plans that support your organisation's purpose, values and vision
10. identify specific details that are critical to achieving the results
11. develop methods of managing organisational difficulties and challenges
12. develop a range of leadership styles and apply them when leading and managing different stakeholders and situations
13. identify and evaluate colleagues' and stakeholder's needs and motivations
14. provide support to help colleagues achieve their objectives
15. protect your colleagues and team members from negative impacts
16. recognise individual and team successes and achievements
17. encourage colleagues to take responsibility for decision making and their own development needs
18. provide individual and team support, advice and guidance when required, especially during periods of setback and change
19. motivate colleagues, team members and stakeholders to present their own ideas
20. empower colleagues and team members to develop their own ways of working within agreed boundaries
21. encourage colleagues to take the lead when they have the

Lead your organisation

relevant knowledge and expertise

22. follow other peer leaders and learn from their professional expertise and leadership styles

23. develop and maintain trust and support across the organisation and stakeholders

24. create your organisation's culture that encourages creativity and innovation through role-modelling

25. request regular feedback on your performance

26. analyse feedback to plan and implement personal performance improvements

27. monitor activity progress in different areas or departments of your organisation

Lead your organisation

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage people within your organisation and other key stakeholders in defining your organisation's direction and committing their energies and expertise to achieving its results
2. the differences between managing and leading
3. how to develop a compelling vision for an organisation
4. how to assess critically current trends, risks and opportunities to your organisation
5. the importance of and what is meant by organisational values
6. how to measure the impact of your organisation on the environment, the local community and society
7. the ways of ensuring that organisational plans support the organisation's purpose, values and vision
8. how to select and successfully apply different methods and techniques for communicating with people across an organisation
9. the types of challenges and difficulties that may arise and ways of identifying and addressing them
10. the different theories, models and styles of leadership and the effect that they can have on organisations
11. how to select and apply leadership styles to different individuals and situations
12. the different methods and techniques for motivating, empowering, rewarding, influencing and persuading colleagues and how to apply them
13. the different types of organisational culture that encourage and recognise creativity and innovation
14. how to recognise and develop the leadership capability of colleagues and follow their lead
15. the sources of feedback on your leadership performance and how to analyse it

Industry and sector specific knowledge and understanding

16. the range of leadership styles in the industry and sector
17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

18. the key colleagues and team members within your organisation,

Lead your organisation

their roles, responsibilities, competences and potential

19. your own values, motivations, aspirations and emotions and the effect these have on your own actions and others

20. your own strengths and limitations in your role of leadership or management

21. the strengths, limitations and potential of colleagues and team members

22. your own role, responsibilities and level of authority

23. the purpose, values, vision and plans for your organisation

24. the leadership culture and capability of your organisation

25. the types of support and advice required and how to respond to these

26. the range of stakeholders you may need to communicate and work with

Lead your organisation

Skills

1. Communicating
2. Consulting
3. Decision-making
4. Empowering
5. Evaluating
6. Following
7. Influencing
8. Inspiring
9. Managing conflict
10. Monitoring
11. Motivating
12. Obtaining feedback
13. Persuading
14. Planning
15. Presenting information
16. Prioritising
17. Problem solving
18. Providing feedback
19. Role-modelling
20. Setting objectives
21. Supporting
22. Thinking strategically
23. Valuing differences

Lead your organisation

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Suite	Management and Leadership
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Provide leadership to your team

Overview

The standard is about providing leadership to your team. You communicate your organisation's vision and values and the team's purpose and objectives, engaging team members to define direction and commit their energies and expertise to achieving results. You agree work objectives for individuals and manage your team through challenges. The standard includes encouraging your team to take responsibility, be creative and innovative, take the lead and work autonomously within defined boundaries. You motivate and support your team to achieve objectives, modelling your organisation's values and expected behaviours.

This standard is for all managers and leaders.

Provide leadership to your team

Performance criteria

- You must be able to:*
1. communicate the purpose and objectives of the team to all members
 2. define direction within your area of responsibility by engaging your team
 3. plan how the team will achieve its objectives by consulting with them
 4. agree individual work objectives with all team members
 5. explain how individual objectives help to achieve the objectives of the team and the organisation
 6. persuade your team to commit their efforts and expertise to achieving results
 7. communicate a vision and shared values of where your organisation is going
 8. check that your team understand how the operational plans align with your organisation's vision, values and objectives
 9. manage your area successfully through challenges
 10. develop a range of leadership styles and apply them to different roles and situations
 11. communicate regularly and effectively with your team
 12. demonstrate that you listen to what your team say and act on it
 13. encourage team members to take responsibility for their own development needs
 14. support team members' resilience
 15. provide support and advice face-to-face or while working remotely
 16. encourage and recognise creativity and innovation within the team
 17. motivate team members to achieve their work and development objectives, providing recognition when they are successful
 18. empower team members to work autonomously and take their own decisions within agreed boundaries
 19. encourage team members to take the lead in their own areas of expertise, following their lead
 20. model behaviours that reflect your organisation's values and expected behaviours to build trust and support in your team
 21. make decisions that meet your organisation's requirements for fairness and integrity
 22. protect your own and your team's work against negative impacts

Provide leadership to your team

- 23. request feedback from others and act on this to improve your leadership practice
- 24. follow the legal, organisational, codes of practice and policies relevant to your role when providing leadership to your team

Provide leadership to your team

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage team members within your area of responsibility to define team direction and persuade them to commit their energies and expertise to achieving results
2. the differences between managing and leading and how to empower team members
3. how to create and communicate a compelling vision to different audiences within your area of responsibility
4. the different leadership styles and how to select and apply these to different situations and team members
5. how to lead and motivate your team face-to-face or remotely
6. how to get and make use of feedback from team members and other colleagues on your leadership performance.
7. the types of difficulties and challenges that may arise and ways of identifying and addressing them
8. how to create and maintain a culture which encourages and recognises creativity and innovation
9. the importance of recognising individual strengths, encouraging others to take the lead and ways to achieve this
10. how to select and successfully apply different methods for encouraging, motivating and supporting team members and recognising achievement
11. how to set objectives which are Specific, Measurable, Achievable, Realistic and Time-bound (SMART)
12. how to plan the achievement of team objectives and the importance of involving team members in this process
13. the importance of showing team members how personal work objectives contribute to achievement of team and organisational objectives

Industry and sector specific knowledge and understanding

14. the industry and sector requirements for the development and maintenance of knowledge, skills and competence
15. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

16. your own role, responsibilities and level of authority

Provide leadership to your team

17. your team members, their roles, responsibilities, competences, needs, motivations, strengths, limitations and potential
18. how to encourage and support resilience of your team members
19. your own values, motivations, emotions, strengths and limitations in your leadership role
20. the vision, strategic objectives and culture of the overall organisation and how your team's purpose, objectives, and operational plans for your area of responsibility align
21. the types of support and advice that team members are likely to need and how to respond to these
22. the leadership styles used across the organisation and how you compare
23. the personal work objectives and organisational standards of performance for your team members

Provide leadership to your team

Skills

1. Coaching
2. Communicating
3. Decision-making
4. Empowering
5. Evaluating
6. Following
7. Involving others
8. Influencing
9. Leadership
10. Leading by example
11. Managing conflict
12. Monitoring
13. Motivating
14. Obtaining feedback
15. Performance management
16. Persuading
17. Planning
18. Problem solving
19. Presenting information
20. Prioritising
21. Providing feedback
22. Problem solving
23. Providing feedback
24. Supporting teams
25. Supporting individual resilience
26. Setting objectives
27. Team building
28. Valuing and supporting others

Provide leadership to your team

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Evaluate your organisation's operating environment

Overview

This standard is about evaluating your organisation's operating environment. You engage with colleagues, team members and stakeholders to support the evaluation. You also monitor political, economic, social, technological, legal and environmental trends and developments in addition to the needs of customers to evaluate the impact on your organisation. You benchmark performance against comparable organisations and consider the ability of your organisation to respond to opportunities and threats. In addition, you develop and maintain systems to manage knowledge and expertise in accordance with organisational policies, legal requirements and codes of practice. This standard is for all managers and leaders.

Evaluate your organisation's operating environment

Performance criteria

- You must be able to:*
1. engage your colleagues and team members to support evaluation of your organisation's operating environment
 2. engage stakeholders to support evaluation of your organisation's operating environment
 3. monitor political, economic, social, technological, legal and environmental trends and developments and evaluate their impact on your organisation
 4. monitor needs, behaviours and expectations of existing and potential customers and evaluate their impact on your organisation
 5. monitor the activities of existing and potential competitors and collaborators and evaluate their impact on your organisation
 6. monitor and evaluate the impact of trends and developments within your organisation
 7. benchmark your organisation's performance and practices with comparable organisations nationally and internationally, where appropriate
 8. compare the strengths and weaknesses of your organisation to respond to opportunities and threats in existing and future work
 9. assess the implications or consequences of future scenarios
 10. specify the assumptions made and risks involved to understand future scenarios
 11. organise information and knowledge in a way that supports the strategic planning and decision-making
 12. structure information to facilitate organisational knowledge management
 13. develop systems to gather information and knowledge within agreed timescales and ethics
 14. maintain systems to manage information and knowledge
 15. identify the internal and external political factors that impact on your organisation's operating environment
 16. identify systemic issues and mitigate their impact on organisational performance
 17. assess future scenarios based on the analysis of trends and developments
 18. explore and assess the range of future scenarios within the environment in which your organisation operates
 19. follow the legal, organisational, codes of practice and policies

Evaluate your organisation's operating environment

relevant to your role when evaluating your organisation's operating environment

Evaluate your organisation's operating environment

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage colleagues and other stakeholders in evaluating your organisation's operating environment
2. the sources of information on customers and competitors and how to use them
3. how to measure and review your organisational performance
4. how to analyse organisational culture and the impact this has on performance
5. how to carry out benchmarking to identify good practice in relation to an organisation's performance and practices
6. how to undertake a strengths, weaknesses, opportunities and threats (SWOT) analysis
7. how to undertake an analysis of the political, economic, social, technological, legal and environmental (PESTLE) factors in the external environment
8. how to analyse stakeholder interests
9. how to build future scenarios and assess their implications

Industry and sector specific knowledge and understanding

10. the sources of information on trends and developments in your sector, including those at a global level and how to access these
11. the current and emerging trends and developments in your sector internationally, nationally and locally
12. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

13. your organisation's structure and culture
14. your organisation's performance and the factors that influence this
15. the factors in the international, national and local market in which your organisation operates
16. your organisation's existing and potential customer base on the market
17. the needs and expectations of your existing and potential customers and other stakeholders
18. your organisation's actual and potential competitors, including their activities and relative performance levels

Evaluate your organisation's operating environment

19. your organisation's actual and potential partners, including their activities and relative performance levels

Evaluate your organisation's operating environment

Skills

1. Analysing
2. Benchmarking
3. Communicating
4. Consulting
5. Customer focused
6. Decision-making
7. Evaluating
8. Information management
9. Monitoring
10. Networking
11. Planning
12. Presenting information
13. Reporting
14. Reviewing
15. Managing risks
16. Scenario building
17. Thinking critically
18. Thinking strategically
19. Thinking systematically

Evaluate your organisation's operating environment

Developed by	Instructus
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Version Number	1
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Date Approved	February 2021
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Indicative Review Date	March 2026
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Validity	Current
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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LBA4
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; evaluate; environment; organisation
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Overview

This standard is about developing your organisation's vision, strategies and business plans. You develop your organisation's vision and strategies by engaging with a variety of stakeholders. You challenge opinions to generate innovative ideas and formulate a vision that aligns with organisational strategies. You communicate the vision and inspire commitment, developing strategic business plans with prioritised objectives. You also develop policies and procedures that support the implementation of business plans and methods for monitoring and evaluating success.

This standard is for all managers and leaders.

Performance criteria

- You must be able to:*
1. develop your organisation's vision and strategies by engaging with the governing bodies, colleagues, strategic partners, shareholders, suppliers, customers and your community
 2. challenge opinions to encourage, generate and recognise innovative solutions
 3. formulate a vision based on an evaluation of the operating environment, the values of your organisation and the expectations of key stakeholders
 4. check that the vision aligns with your organisation's longer-term strategic goals
 5. communicate the vision to inspire stakeholders to commit to achieving it
 6. develop strategic business plans by engaging colleagues and key stakeholders
 7. establish and prioritise strategic objectives that are consistent with your organisation's vision and values
 8. identify programmes of activity capable of achieving the strategic objectives
 9. create a business plan to implement your organisation's strategic objectives
 10. evaluate potential risks and develop realistic plans to manage risks
 11. identify resource requirements and evaluate their availability both now and in the future
 12. develop policies that will guide the work of colleagues towards the achievement of the organisation's vision
 13. identify reliable measures and methods for monitoring and evaluating the plan
 14. communicate the strategic business plan to win the support and commitment of key stakeholders
 15. present ideas and arguments convincingly to engage people and create a common sense of purpose
 16. identify stakeholders' needs and interests and manage these effectively
 17. provide strategic direction and clear parameters that empower stakeholders to apply their energies and expertise creatively to achieve the vision
 18. monitor organisational performance against strategic business

plans

19. evaluate organisational performance against strategic business plans
20. seek opportunities to improve your own performance
21. balance risks against the benefits that may arise from taking risks
22. review and redefine the vision, strategies and business plan to reflect changes in the operating environment
23. follow the legal, organisational, codes of practice and policies relevant to your role when developing your organisation's vision, strategies and business plans

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage colleagues and stakeholders in developing an organisation's vision, strategies and business plans
2. how to formulate an appropriate and effective vision for an organisation
3. the principles and methods of communication, and how to apply them
4. the level of strategic direction colleagues and team members require, and how to provide this direction in ways that promote energy and creativity
5. the importance of long and medium-term planning to the success of an organisation
6. the principles of strategic management and business planning, including what strategic business plans should cover
7. the importance of creativity and innovation in strategic management
8. how to identify and manage potential risks in relation to the achievement of objectives
9. how to develop strategic objectives which are SMART (Specific, Measurable, Achievable, Realistic, and Time-bound)
10. how to delegate responsibility and allocate resources to support a strategic plan
11. how to identify sustainable resources and ensure their effective use to support a strategic plan
12. how to develop measures and methods for monitoring and evaluating performance against the strategic business plan

Industry and sector specific knowledge and understanding

13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out
14. the trends and developments in your sector locally, nationally and internationally

Context specific knowledge and understanding

15. the key colleagues and team members at your organisation, their roles, responsibilities, expectations, needs, competences and potential
16. your organisation's operating environment, stakeholders and their interests and expectations

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17. your organisation's values, purpose and longer-term goals
 18. your organisation's actual and potential customer base and their needs and expectations
 19. your actual and potential competitors and collaborators, and their strategies and plans
 20. the opportunities in your organisation's operating environment at local, national and international levels and your organisation's ability to respond
 21. the processes for engaging with employees and their representatives within your organisation
 22. the organisational sources of information that can aid monitoring and evaluation

Skills

1. Analysing
2. Building consensus
3. Communicating
4. Consulting
5. Decision-making
6. Delegating
7. Evaluating
8. Influencing
9. Innovating
10. Involving others
11. Leadership
12. Monitoring
13. Obtaining feedback
14. Persuading
15. Planning
16. Presenting information
17. Prioritising
18. Reviewing
19. Risk management
20. Setting objectives
21. Thinking creatively
22. Thinking strategically

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Originating Organisation	Instructus
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Original URN	CFAM&LBA5, CFAM&LBA6
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; vision; strategy; organisation
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Overview

This standard is about promoting equality of opportunity, diversity and inclusion in your organisation. You identify your own and your organisation's responsibilities and liabilities related to equality, diversity and inclusion. You actively promote diversity and inclusion in the way that you behave and the language that you use. You review the diversity needs of colleagues and customers and identify improvements that can be made, taking action to uphold individuals' rights. You maintain systems to monitor, review and report on progress related to equality, diversity and inclusion and seek specialist expertise when required.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. identify your organisation's and your own responsibilities and liabilities under equality, diversity and inclusion legislation and any relevant codes of practice
2. identify your own responsibilities and liabilities under equality, diversity and inclusion legislation and any relevant codes of practice
3. check that your organisation's written equality, diversity and inclusion policy and action plan enables you to carry out your own responsibilities
4. agree revisions to your organisation's written equality, diversity and inclusion policy and action plan with decision makers, if required
5. check that the equality, diversity and inclusion policy and action plan has been communicated to all colleagues and other relevant stakeholders
6. challenge the status quo and seek better alternatives when required
7. promote equality of opportunity, diversity and inclusion by engaging colleagues and other key stakeholders
8. agree management commitment to promoting equality of opportunity, diversity and inclusion
9. check that commitment to promoting equality of opportunity, diversity and inclusion underpins your organisation's vision, values, objectives and plans
10. use language and behaviours that role-models your organisation's commitment to equality of opportunity, diversity and inclusion
11. monitor the language and behaviours used by colleagues to ensure it supports your organisation's commitment to equality of opportunity, diversity and inclusion
12. review the diversity and needs of your organisation's current and potential customers
13. select communication media and styles that meet the needs of different colleagues, customers and situations
14. identify areas where needs are not being satisfied or where the diversity of customers should be improved
15. review the diversity of the workforce, at all levels, in comparison to the population and your organisation's current and potential customers and

16. consider the views and actions of colleagues, team members and other stakeholders when making decisions
17. support colleagues, team members and other stakeholders to encourage use of their knowledge, skills and expertise
18. take action to uphold individuals' rights following your organisation's guidelines for decision-making and building allyship
19. identify areas for improvement in the diversity of the workforce
20. seek specialist expertise in relation to equality, diversity and inclusion issues, where required
21. maintain systems to monitor, review and report on progress in relation to equality of opportunity, diversity and inclusion within your organisation
22. use the findings of your reviews to identify required actions and changes to practice
23. comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. your organisation's and your personal responsibilities and liabilities under equality, diversity and inclusion legislation and the relevant codes of practice
2. the different definitions of equality, diversity and inclusion
3. the different forms which discrimination and harassment might take in the workplace
4. the business case for ensuring equality of opportunity and promoting diversity and inclusion
5. the importance of senior management commitment to promoting equality of opportunity, diversity and inclusion and how this can be achieved
6. why it is important to lead by example in terms of your behaviour, words and actions supporting a commitment to equality of opportunity, diversity and inclusion
7. how to recognise when the behaviour, words and actions of colleagues and customers does, and does not, support a commitment to equality of opportunity, diversity and inclusion and the actions that can be taken to correct behaviours
8. the importance of reviewing the diversity and needs of an organisation's current and potential customers to identify areas for improvement and how to review
9. the importance of reviewing the diversity of an organisation's workforce, at all levels, to identify areas for improvement and how to review
10. how to develop a written equality, diversity and inclusion policy and what it should cover
11. how to communicate the organisation's equality, diversity and inclusion policy to all people who work for the organisation and other relevant parties
12. the sources of specialist expertise in relation to equality, diversity and inclusion
13. how to establish systems for monitoring, reviewing and reporting on progress in relation to equality of opportunity, diversity and inclusion within an organisation

Industry and sector specific knowledge and understanding

14. the industry and sector-specific legislation, regulations, guidelines and codes of practice relating to equality, diversity and inclusion
15. the range of equality, diversity and inclusion issues and developments that are particular to your industry and sector

Context specific knowledge and understanding

16. the overall vision, values, objectives, plans and culture of your organisation
17. why allyship in the workplace is important
18. the planning and decision-making processes within your organisation including the guidelines related to fairness and consistency
19. your organisation's current and potential customers and their needs
20. the current diversity of your organisation's workforce
21. the key stakeholders with an interest in equality, diversity and inclusion in your organisation
22. your organisation's written equality, diversity and inclusion policy and action plan and how they are communicated to colleagues and to other relevant stakeholders
23. the mechanisms for consulting with colleagues or their representatives on equality, diversity and inclusion issues, and why consideration of their views and actions is important
24. the sources of specialist expertise in relation to equality, diversity and inclusion used by your organisation (internal and external)
25. your organisation's systems for monitoring, reviewing and reporting on progress in relation to equality of opportunity, diversity and inclusion

Skills

1. Building allyship
2. Communicating
3. Consulting
4. Empathising
5. Evaluating
6. Influencing
7. Involving others
8. Leadership
9. Leading by example
10. Monitoring
11. Persuading
12. Planning
13. Reporting
14. Reviewing
15. Valuing and supporting others

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Original URN	CFAM&LBA7
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; strategic; business plan
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Develop your organisation's values and culture

Overview

This standard is about developing your organisation's values and culture. You develop your organisation's values and culture, agreeing these with colleagues, team members and stakeholders. You formulate cultural policies, programmes and systems and communicate the values across your organisation. You role-model your organisation's values in the way that you behave, encouraging colleagues to demonstrate the values in their work behaviours too. The standard also includes challenging behaviours and messages that conflict with the agreed values and reviewing the values to understand how they work in practice.

This standard is for all managers and leaders.

Develop your organisation's values and culture

Performance criteria

You must be able to:

1. engage colleagues, team members and other stakeholders in developing your organisation's values and culture in line with the organisation's vision and strategy
2. agree values consistent with your organisation's overall vision and strategy and the needs and interests of stakeholders
3. identify the behaviours expected of colleagues and team members aligned with its culture and values
4. communicate the agreed values to colleagues and team members across your organisation
5. encourage colleagues and team members to act in ways consistent both with organisational values and with their culture of origin
6. formulate policies, programmes and systems to support the agreed values
7. support colleagues and team members to demonstrate the values in their work
8. demonstrate awareness of your own values, motivations and emotions
9. identify colleagues' and team members' needs, feelings and motivations and take an active interest in their opinions
10. role-model organisational behaviours and values to inspire colleagues and team members to show respect, helpfulness and cooperation
11. monitor the way values are applied at work
12. challenge behaviour and counter messages that conflict with the agreed values
13. review your organisation's culture and redefine or reinforce values
14. follow, and ensure others follow, legal requirements, industry regulations, organisational policies and professional codes

Develop your organisation's values and culture

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage colleagues and team members in your organisation and other key stakeholders in developing your organisation's values and culture
2. the concept of culture as applied to organisations
3. the importance of values in underpinning individual and organisational performance
4. the internal and external factors that influence organisational culture, including national cultures
5. the different types of organisational culture, their features and benefits
6. the relationship between organisational culture, strategy and performance
7. the principles and methods of managing culture change within organisations

Industry and sector specific knowledge and understanding

8. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out
9. the types of organisational culture in your sector and their strengths and limitations

Context specific knowledge and understanding

10. the cultures of your workforce and the implications of these for organisational culture
11. your organisation's vision, strategies and current organisational culture
12. the organisational values, assumptions and behaviours that are consistent and inconsistent with your vision and strategy
13. the methods for communicating values, and supporting the way they are applied in your organisation
14. the ways of dealing with messages and behaviour that conflict with agreed values and assumptions

Develop your organisation's values and culture

Skills

1. Building consensus
2. Communicating
3. Empathising
4. Influencing
5. Leading by example
6. Managing conflict
7. Monitoring
8. Motivating
9. Persuading
10. Reviewing
11. Role-modelling
12. Thinking strategically
13. Valuing and supporting others

Develop your organisation's values and culture

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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LBA8
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; organisation; values; culture
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Develop operational plans and manage risks

Overview

This standard is about developing operational plans and managing risks within your organisation. You develop operational plans that are consistent with organisational values and strategy through collaboration with colleagues and stakeholders. You identify the resources required to deliver operational plans and communicate them to secure commitment. You specify risk management activities including defining risk criteria for your organisation. You also evaluate current and planning organisational activities to identify risks to produce a risk profile. The standard includes providing support to colleagues to integrate risk management into strategic and operational activities and evaluating how identified risks have been dealt with.

This standard is for all managers and leaders.

Develop operational plans and manage risks

Performance criteria

You must be able to:

1. develop operational plans in collaboration with colleagues from your area of responsibility and other key stakeholders
2. develop operational plans that are consistent with organisational values and strategy and the specific objectives of your area of responsibility
3. identify synergies with other areas within the organisation when developing operational plans
4. compare innovative approaches and tried-and-tested solutions when developing plans
5. identify resource requirements and their availability both now and in the future
6. define indicators and methods for monitoring and evaluating the plans
7. communicate operational plans to secure colleague commitment and the support of other key stakeholders
8. review operational plans, in the light of changes to organisational strategy and the operating environment
9. specify risk management activities that take account of the size and nature of your organisation
10. develop your organisation's written risk management policy, including a statement of risk appetite and responsibilities for risk management
11. confirm that your organisation's risk management policy has management support and is clearly communicated across the organisation and to other stakeholders
12. define, and periodically review, risk criteria for your organisation, considering the views of relevant people across the organisation and stakeholders
13. evaluate current and planned organisational activities to identify potential risks, the nature of the risks, the probability of occurrence and consequences
14. produce a risk profile for your organisation and, taking account of your organisation's risk criteria and other relevant information
15. prioritise identified risks following your organisation's procedures
16. communicate risk information to colleagues and stakeholders to enable decisions and actions to be taken in terms of accepting or treating the risks
17. allocate resources to enable effective risk management

Develop operational plans and manage risks

18. provide support for colleagues to integrate risk management into strategic and operational plans and activities
19. collect information about how identified risks have been or are being dealt with, including contingency plans which have been put in place
20. develop an organisational culture in which people are risk aware but are prepared to take acceptable risks and to make and learn from mistakes
21. seek specialist support on risk management issues, where necessary
22. maintain the risk management process in your organisation, identifying potential improvements and making changes where necessary
23. follow the legal, organisational, codes of practice and policies relevant to your role in developing operational plans and managing risks

Develop operational plans and manage risks

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage employees and stakeholders in operational planning
2. the principles and methods of short to medium-term planning and how to develop and assign objectives which are Specific, Measurable, Achievable, Realistic and Time-bound (SMART)
3. how to analyse and manage risks by contingency planning
4. how to identify resource requirements and evaluate their availability and sustainability
5. the relevant national and international standards in risk management
6. the different types of risks and the factors which drive different types of risks
7. the key stages in the risk management process, including developing a written risk management policy and what it should cover, risk management tools, techniques and indicators
8. how to communicate the written risk management policy to colleagues and other relevant stakeholders
9. what risk criteria might cover, including the importance of seeking and taking account of the views of colleagues and stakeholders
10. the ways of identifying and clearly describing potential risks in relation to current and planned activities, the nature of the risks, the probability of occurrence and consequences
11. the types of decisions and actions that might be taken in relation to identified risks
12. why it is important and how to collect and evaluate information on how identified risks have been or are being dealt with, including contingency plans
13. the ways of developing an organisational culture in which colleagues are risk aware but are prepared to take acceptable risks in undertaking activities

Industry and sector specific knowledge and understanding

14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out
15. the current and potential competitors and collaborators in the sector, and their strategies and plans

16. the typical risks encountered in the sectors in which your organisation operates

Context specific knowledge and understanding

17. your organisation's operating environment, actual and potential customer base, opportunities and current and planned organisational activities

18. the overall vision and values of your organisation and the objectives you are responsible for achieving

19. the processes for engaging with employees within your organisation to determine their needs and expectations

20. your organisation's culture in relation to risks criteria

21. the key stakeholders with an interest in risk management in your organisation

22. the written risk management policy and the risks criteria

23. the current risk profile of your organisation, prioritised risks and the decisions and actions

24. the identified potential risks, including any contingency plans in place

25. the resources available across the organisation to support risk management

26. the sources of specialist support on risk management

27. the systems in place for monitoring and reviewing the effectiveness of the risk management processes in your organisation

Develop operational plans and manage risks

Behaviours

1. Assessing
2. Building consensus
3. Communicating
4. Consulting
5. Contingency planning
6. Decision-making
7. Delegating
8. Evaluating
9. Influencing
10. Information management
11. Innovating
12. Involving others
13. Monitoring
14. Persuading
15. Planning
16. Presenting information
17. Prioritising
18. Reflecting
19. Reviewing
20. Risk management
21. Setting objectives
22. Scenario building
23. Thinking systematically
24. Thinking critically

Develop operational plans and manage risks

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Status	Original
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Originating Organisation	Instructus
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; operational plans
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Overview

This standard is about developing, maintaining and evaluating business continuity plans and arrangements to ensure that organisations continue to exercise core functions in the event of a business disruption or emergency. You develop business continuity plans in collaboration with colleagues, team members and stakeholders and confirm the scope and objectives. You evaluate your organisation's structures and processes and assess alternative strategies to mitigate the effective of business disruption. You also produce a framework for business continuity management, ensuring that resources are proportionate to the potential impact. The standard includes presenting your plans and encouraging colleagues and team members to take ownership, providing training if required.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. develop business continuity plans and arrangements by collaborating with colleagues, team members and stakeholders
2. confirm the required aim, scope and objectives of business continuity plans and arrangements
3. identify key products or services and the critical activities and resources that support them
4. evaluate the resilience of the structures and processes of the organisation and external organisations
5. identify and assess alternative strategies to mitigate the effects of business disruption or emergencies
6. develop business continuity plans and arrangements that can mitigate the effects of business disruption or emergencies
7. produce a framework for business continuity management, co-ordination and control
8. develop procedures for determining when the business continuity plan must be invoked
9. define roles and responsibilities of colleagues and team members involved in business continuity management, co-ordination and control
10. outline prioritisation of organisational processes or services
11. develop procedures for activating response arrangements
12. agree provision of resources to support business continuity plans
13. provide resilient information and communications systems
14. check that the resources committed to business continuity management are proportionate to the potential impact of business disruption or emergencies
15. present business continuity plans and arrangements to colleagues, team members and stakeholders to promote understanding
16. establish the ownership of business continuity plans and arrangements within different business units
17. communicate business continuity plans and arrangements to colleagues, team members and other stakeholders
18. arrange training for colleagues and team members
19. provide exercises to validate and practice business continuity plans and arrangements
20. review business continuity plans systematically in response to organisational changes, changes to the potential impact of

disruption or emergencies and lessons identified from incidents and exercises

Knowledge and understanding

You need to know and understand:

1. how to engage colleagues, team members and stakeholders in developing business continuity plans and arrangements
2. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out
3. how to confirm the aim, scope and objectives of business continuity plans and arrangements
4. the importance of involving stakeholders in the business continuity planning process and recognising their requirements and expectations
5. the potential impact of disruption or emergencies on the organisation
6. how to analyse the impact of disruptions or emergencies on the business
7. the local arrangements for managing emergencies
8. how to develop a framework including the procedures for determining when the business continuity plan must be invoked, the roles and responsibilities of key people in the organisation, prioritisation of organisational processes or services
9. the procedures for activating response arrangements, provision of resources (e.g. people, premises, technology, equipment)
10. how to provide resilient information and communications systems
11. how to identify aspects of business continuity planning which can be addressed by training
12. how to plan for provision of resources in the event of a business disruption or emergency
13. the information needs following a business disruption or emergency
14. how to identify critical and non-critical functions of the organisation
15. the organisation's structure, governance and business processes
16. the organisation's priorities for processes or service delivery
17. the methods of raising awareness of business continuity plans and arrangements
18. the importance of obtaining ownership of plans and arrangements at the appropriate level
19. the importance of developing a business continuity management culture within an organisation

20. how and why business continuity plans must be systematically reviewed

Skills

1. Analysing
2. Communicating
3. Consulting
4. Evaluating
5. Influencing
6. Leadership
7. Negotiating
8. Networking
9. Planning
10. Presenting Information
11. Prioritising
12. Problem solving
13. Reporting
14. Thinking Strategically

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Originating Organisation	Instructus
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; evaluate; business continuity; plans and arrangement
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Manage Corporate Social Responsibility (CSR)

Overview

This standard is about managing Corporate Social Responsibility (CSR). You review and develop your organisation's CSR policy and objectives with stakeholders. You also evaluate the impact that your organisation has on the environment, sustainability, local community and wider society to identify how it can become more beneficial. You check that the CSR policy aligns with business activities and communicate the details to stakeholders. The standard includes supporting initiatives that create value for your organisation, monitoring compliance with the CSR policy, and defining actions to ensure that objectives are met. You communicate progress and achievements to stakeholders and revise the policy following feedback and changes in the operating environment.

This standard is for all managers and leaders.

Manage Corporate Social Responsibility (CSR)

Performance criteria

You must be able to:

1. review your organisation's CSR policy and objectives by engaging with colleagues and stakeholders
2. develop your organisation's CSR policy and objectives by collaborating with colleagues
3. evaluate the impact of your organisation on the environment, sustainability, the local community and society as a whole
4. identify ways in which your organisation's impact can be more beneficial
5. check that your CSR policy and objectives reflect your organisation's vision and values and its legal, ethical, social and environmental responsibilities
6. communicate your CSR policy and its benefits to colleagues and stakeholders
7. check that your organisation's normal business activities comply with your CSR policy (employment, selection of collaborators, suppliers, use of resources, health and safety)
8. support initiatives which create shared value for your organisation, the community and the wider social and physical environment
9. monitor compliance with your CSR policy and progress towards its objectives
10. define actions to ensure that objectives are met
11. provide advice, guidance and support towards achieving CSR objectives, when required
12. report progress towards your CSR objectives to stakeholders and ask for feedback
13. communicate the achievement of your CSR objectives to stakeholders
14. revise your organisation's CSR policy and objectives, using results, feedback from stakeholders and changes in the operating environment

Manage Corporate Social Responsibility (CSR)

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the range of corporate social responsibility (CSR) principles, methods, tools and techniques
2. how to engage a range of stakeholders in CSR including colleagues, customers, investors, suppliers, communities, regulators, special interest groups and society
3. how to measure the impact of your organisation on the environment, the local community and society
4. the principles and methods of effective communication and negotiation, and how to apply them when collaborating with colleagues and stakeholders
5. the different consensus-building principles, methods and techniques
6. the principles of sustainability
7. how to monitor compliance with the CSR policy
8. how to provide people with the advice, guidance and support they need
9. how to evaluate the effectiveness of a CSR policy
10. how to report achievement of, and progress towards, CSR objectives

Industry and sector specific knowledge and understanding

11. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

12. the colleagues within your area of work, their roles, responsibilities, competences and potential
13. your organisation's legal, ethical, social and environmental responsibilities
14. your organisation's stakeholders, their interests and expectations
15. your organisation's values, vision, activities and operating environment

Manage Corporate Social Responsibility (CSR)

Skills

1. Assessing
2. Balancing competing needs and interests
3. Building consensus
4. Communicating
5. Consulting
6. Evaluating
7. Influencing
8. Inspiring
9. Involving others
10. Leadership
11. Monitoring
12. Networking
13. Persuading
14. Presenting information
15. Reporting
16. Reviewing
17. Setting objectives

Manage Corporate Social Responsibility (CSR)

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Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFAM&LBB3
Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; corporate social responsibility

Overview

This standard is about ensuring compliance with your organisation's legal, regulatory, ethical and social requirements. You monitor your organisation's compliance with specified requirements and the impact, developing policies and procedures to support the process. You also emphasise the importance of putting policies into practice and provide support for colleagues. You identify risks, hazards and ethical concerns, taking action to rectify any breaches in compliance and avoid them being repeated. The standard also includes providing information to support compliance and reporting to stakeholders.

This standard is for all managers and leaders.

Performance criteria

- You must be able to:*
1. monitor national and international legal, regulatory, ethical and social requirements and the effect they have on your organisation
 2. evaluate what will happen if you do not meet national and international legal, regulatory, ethical and social requirements
 3. develop policies and procedures to make sure your organisation meets all requirements
 4. check that colleagues understand organisational policies and procedures and the importance of putting them into practice
 5. monitor the way policies and procedures are put into practice and provide support
 6. support colleagues or team members to report any concerns about not meeting the requirements
 7. identify potential risks and hazards
 8. identify and raise ethical concerns with colleagues and decision-makers
 9. identify and correct failures to meet the requirements
 10. identify reasons for not meeting requirements
 11. encourage others to share information and knowledge within the constraints of confidentiality
 12. adjust policies and procedures to reduce the likelihood of failures in the future
 13. implement difficult or unpopular decisions when necessary to ensure compliance
 14. provide full reports about any failures to meet the requirements to key stakeholders
 15. provide information and knowledge to support compliance with legal, regulatory, ethical and social requirements

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of having an ethical and value-based approach to governance and how to put this into practice
2. the legal requirements governing the running of organisations
3. the current and emerging social attitudes to management and leadership practice and the importance of being sensitive to these
4. the ways in which other organisations deal with current and emerging social concerns and expectations
5. how to identify potential risks and hazards related to legal, regulatory, ethical and social requirements
6. the ways that ethical concerns can be identified and raised

Industry and sector specific knowledge and understanding

7. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out (national and international)
8. the current and emerging social concerns and expectations within your sector

Context specific knowledge and understanding

9. the organisation's culture and values and the effect these have on corporate governance
10. the organisational policies and procedures that support colleagues to meet the requirements specified
11. the support available to enable colleagues to report concerns about not meeting requirements
12. the processes for maintaining policies and procedures and the colleagues involved
13. the importance of making sure that policies and procedures continue to be effective
14. the different ways that colleagues or team members may not meet the requirements and the risks of these happening
15. the organisational procedures for dealing with colleagues who do not meet the requirements, and how these are reported

Skills

1. Analysing
2. Assessing
3. Communicating
4. Decision-making
5. Information management
6. Involving others
7. Leadership
8. Monitoring
9. Motivating
10. Presenting information
11. Providing feedback
12. Reporting
13. Risk management
14. Valuing and supporting members of staff

Developed by	Instructus
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Version Number	1
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Validity	Current
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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LBB4
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; legal; regulatory; ethical; social
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Overview

This standard is about using information for decision making. You engage with the colleagues affected by decisions and colleagues who can help. You establish the objectives of decision-making and agree these with all parties involved. The standard includes obtaining information to support decision making, checking its accuracy, and resolving any issues. You draw conclusions based on analysis of the information and take decisions within the scope of your authority. You obtain help when you need it and discuss your concerns when you identify any conflicts with organisational values and policies.

This standard is for all managers and leaders.

Use information for decision making

Performance criteria

You must be able to:

1. identify colleagues who may be affected by decisions and their interests
2. engage colleagues who can contribute to decision-making processes or will be affected by the decisions
3. establish the objectives of the decisions to be taken and what you are trying to achieve
4. check that all parties involved agree with the objectives
5. identify the information you need to take decisions and where this can be sourced
6. obtain information to enable you to take decisions
7. verify the accuracy and reliability of the information obtained
8. resolve issues with inadequate, unreliable, contradictory or ambiguous information
9. analyse the information to identify facts, patterns and trends that may impact on your decisions
10. identify and evaluate the range of options open to you
11. draw conclusions supported by reasoned arguments and evidence, clearly stating any assumptions you have made and risks that may be involved
12. take decisions in line with your objectives, within the scope of your authority
13. make decisions that are consistent with your organisation's values, policies, guidelines, and timelines
14. obtain help and advice if you do not have adequate information
15. analyse the data to inform the decision making
16. refer decisions that are outside your area of responsibility or scope of authority
17. discuss your decisions with key stakeholders if they are likely to conflict with current values, policies, guidelines and timelines
18. communicate your decisions and rationale to colleagues who are affected
19. follow the legal, organisational, codes of practice and policies relevant to using information for decision making

Use information for decision making

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of engaging those who can contribute or may be affected in the decision making process, and how to do so
2. the importance of setting objectives for the decision, and how to make it clear what the decision must achieve and what is outside the scope of the decision
3. how to identify the information you need to take the decision and how to access it from different sources
4. how to judge whether you have the required information to allow you to take the decision
5. how to identify if information is inadequate, unreliable, contradictory or ambiguous, and how to remedy this within required timelines
6. how to analyse information to identify relevant facts, patterns and trends
7. the range of options open to you and how to evaluate the options
8. the concept of data driven decision making
9. how to justify your conclusions using evidence to support them
10. the importance of ensuring your decisions are in line with your organisation's values, policies, guidelines and timelines
11. the importance of showing any assumptions you have made and risks that may be involved, and how to do so
12. how to communicate your decision to different audiences

Industry and sector specific knowledge and understanding

13. the industry and sector requirements for using information to make decisions
14. the legal, organisational, codes of practice and policies relevant to using information for decision making

Context specific knowledge and understanding

15. the colleagues who can contribute to the decision making process or will be affected by the decision
16. the facts, patterns and trends within your organisation that may impact on your decision
17. your organisation's values, policies, guidelines and timelines related to your decisions
18. the scope of your authority for taking decisions, when you need to

Use information for decision making

refer decisions to someone else and the colleagues you may need to refer to

19. the steps to take if you do not have the required information, the decision is outside your area of responsibility, or your decisions conflict with values, policies, guidelines and timelines required

Use information for decision making

Skills

1. Acting assertively
2. Analysing
3. Assessing
4. Communicating
5. Decision-making
6. Evaluating
7. Information management
8. Involving colleagues
9. Prioritising
10. Problem solving
11. Setting objectives
12. Time management

Use information for decision making

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Originating Organisation	Instructus
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Original URN	CFAM&LEC5
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; decision making
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Overview

This standard is about identifying and evaluating opportunities for innovation and improvement. You collaborate with colleagues and team members to identify opportunities to develop new and existing products or services, markets or processes. The standard covers monitoring trends and developments, including benchmarking your organisation against other comparable organisations. You understand how the organisational culture impacts on innovation. You evaluate potential innovations and improvements against agreed criteria, presenting findings to stakeholders. You also take action to defend intellectual property rights when required.

This standard is for all managers and leaders.

Performance criteria

- You must be able to:*
1. identify opportunities for innovation and improvement through collaboration with colleagues and team members
 2. identify potential new ideas in collaboration with external experts and other organisations
 3. monitor trends and developments in your organisation's operating environment
 4. monitor the performance of your organisation's products, services and processes
 5. benchmark your organisation's products and services with comparable organisations
 6. develop potential new products, services, markets, or processes
 7. manage improvements to existing products, services and processes
 8. encourage, generate and recognise imaginative and innovative solutions from colleagues and team members
 9. agree clear criteria for evaluating potential innovations and improvements with key stakeholders
 10. gather sufficient, valid information to allow potential innovations and improvements to be evaluated
 11. gather, store and retrieve information within the budget and timescales agreed
 12. evaluate potential innovations and improvements against agreed criteria
 13. present your evaluation findings to key stakeholders to help them appreciate the potential value of innovations and improvements
 14. communicate your evaluation to colleagues and team members to reinforce their commitment to seek opportunities for innovation and improvement
 15. defend the intellectual property rights of innovations by acting, where required
 16. follow the legal, organisational, codes of practice and policies relevant to your role when identifying and evaluating opportunities for innovation and improvement

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage employees and stakeholders in identifying and evaluating opportunities for innovation and improvement
2. how organisational culture impacts on innovation
3. the principles of monitoring and the methods, tools and techniques that can be used
4. the principles of benchmarking, and the methods, tools and techniques that support this
5. the range of change management methodologies, tools and techniques available
6. how to develop and gain consensus on criteria for evaluating potential innovations and improvements
7. how to gather and validate information to evaluate potential innovations and improvements against criteria
8. innovation principles, methods, tools and techniques and how to protect the intellectual property rights
9. how to evaluate potential innovations and improvements and present finding to stakeholders

Industry and sector specific knowledge and understanding

10. the current and emerging trends and developments in your sector
11. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

12. the colleagues and team members within your area of work, their roles, responsibilities, competences and potential
13. the political, economic, social, technological, legal and environmental factors that affect your organisation
14. the external experts and other organisations with which you may collaborate to generate and develop ideas
15. your organisation's operating environment, business processes, markets, products and services
16. your organisation's stakeholders, their interests and expectations
17. the change management approaches used in your organisation

Skills

1. Analysing
2. Assessing
3. Benchmarking
4. Building consensus
5. Communicating
6. Consulting
7. Empowering
8. Evaluating
9. Forecasting
10. Information management
11. Innovating
12. Involving others
13. Monitoring
14. Networking
15. Presenting information
16. Scenario building
17. Thinking creatively
18. Valuing and supporting members of staff

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Version Number	1
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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LCA1
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; innovation; evaluation; improvement
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Plan change in your work environment

Overview

This standard is about the planning change in your work environment. You engage employees and other stakeholders and assess the gap between current and future states. You identify obstacles to change and plan approaches to overcome them. The standard includes planning business continuity activities and communication strategies to keep stakeholders informed. You also identify change in roles and responsibilities and the training and support requirements of employees and colleagues. You communicate your change plans to explain how different stakeholders are affected and overcome difficulties during planning. You also monitor engagement with the change programme and recognise the contributions and cooperation of those involved. You evaluate the process to identify improvements to future organisational changes.

This standard is for all managers and leaders.

Plan change in your work environment

Performance criteria

You must be able to:

1. engage employees and other stakeholders in planning changes
2. outline the processes, systems, structures, roles or cultures that need to be changed with stakeholders
3. assess the gap between the current state and the required future state
4. identify obstacles to changes
5. develop a plan to achieve the required changes agreed
6. agree evaluation criteria to measure the success of change processes with stakeholders
7. identify the roles and responsibilities of colleagues involved in or affected by the changes
8. plan for the continuity of business activities during the period of changes
9. evaluate the risks associated with plans and develop contingency arrangements
10. identify how and when progress will be monitored against the plans
11. develop communication strategies to keep colleagues and stakeholders informed about the progress
12. present plans for change using appropriate tools to evaluate its impact
13. ask employees and stakeholders to give feedback on changes
14. ask employees and stakeholders to suggest innovations and improvements to products, services, processes, systems, structures, roles and cultures
15. communicate the business case for changes, specifying both the benefits, costs and risks
16. provide opportunities for employees and other stakeholders to discuss business cases for change, provide feedback, express any concerns and make suggestions
17. plan changes, identifying roles and responsibilities
18. evaluate how the changes will affect employees and other stakeholders
19. mitigate for change and understand the differences between change and crisis management
20. identify training or support that employees and stakeholders need and how and when these will be provided
21. communicate with employees and other stakeholders about

Plan change in your work environment

- change processes, specifying how it affects them and any actions required of them
22. discuss planning progress, overcoming difficulties and inviting suggestions for improvements
 23. monitor engagement with and responses to the change planning processes
 24. provide training, support and encouragement to colleagues
 25. recognise the contributions and cooperation of those involved and affected by the change
 26. evaluate employees experience of the change planning process and use the lessons learned to improve future change processes
 27. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to plan organisational change

Plan change in your work environment

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the main models and methods for managing organisational change, and their strengths and weaknesses, and how to select an approach that matches a defined organisational change
2. the theory of teams, including team-building techniques and how to apply them when engaging employees and stakeholders to plan and deliver organisational change
3. how to develop and gain consensus on criteria for evaluating the success of the change process with stakeholders
4. how to assess the risks and benefits associated with change strategies and plans
5. the importance of contingency planning and how to do so effectively
6. the obstacles to change, and the techniques that deal with these
7. the range of stakeholder expectations and how they influence the process
8. how to engage employees and other stakeholders in change processes
9. the principles and methods of effective communication and how to apply them
10. how to encourage people to provide feedback and respond appropriately to feedback
11. how to identify individual training needs and provide the support people need to cope with change
12. the monitoring and evaluation principles, methods, tools and techniques
13. how to evaluate people's experience of change and identify the lessons to be learned

Industry and sector specific knowledge and understanding

14. your organisation's current position in its sector and operating environment, compared with its main competitors, relevant to change programmes
15. the range of information sources that are relevant to the sector, and related sectors, in which your organisation operates
16. the current and emerging trends and developments in your sector
17. the legal, organisational, codes of practice and policies relevant to

Plan change in your work environment

your role and the activities being carried out

Context specific knowledge and understanding

18. the individuals within your area of work, their roles, responsibilities, competences and potential
19. your organisation's culture, the vision for the future, reasons for change, consultation processes, the risks and expected benefits
20. the business-critical activities, interdependencies, factors that need to be changed, and the associated priorities and reasons
21. your organisation's communication channels, both formal and informal
22. the change management frameworks and methods used in your organisation
23. how to mitigate for change and the differences between change and crisis management
24. the business case for change in your organisation, including cost-benefit analysis techniques
25. the different obstacles to change within your organisation
26. your organisation's stakeholders, their interests and expectations

Plan change in your work environment

Skills

1. Analysing
2. Assessing
3. Communicating
4. Consulting
5. Contingency planning
6. Decision-making
7. Empathising
8. Empowering
9. Evaluating
10. Influencing
11. Information management
12. Innovating
13. Involving others
14. Monitoring
15. Negotiating
16. Obtaining feedback
17. Persuading
18. Presenting information
19. Planning
20. Problem solving
21. Reflecting
22. Reporting
23. Risk management
24. Stress management
25. Team building
26. Thinking systematically
27. Valuing and supporting others

Plan change in your work environment

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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LCA2, CFAM&LCA3
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; plan change
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Implement and evaluate change

Overview

This standard is about implementing and evaluating change. You change processes, systems, structures, roles or cultures by engaging with employees and other stakeholders. You delegate responsibilities, supporting and training your team. You monitor change progress against plans, maintain business continuity and assess the impact of the changes. You understand the increased need to be agile to manage risks or a crisis. You also identify the benefits or disadvantages resulting from the change. The standard includes evaluating change implementation, learning the lessons from the change process itself and communicating findings to stakeholders.

This standard is for all managers and leaders.

Implement and evaluate change

Performance criteria

You must be able to:

1. engage employees and other stakeholders in implementing changes
2. initiate your organisation's plans for change in line with agreed timescales and available resources
3. delegate responsibilities to colleagues in line with your plans
4. provide support and encouragement to colleagues implementing changes
5. arrange training and support for colleagues impacted by changes
6. implement your organisation's agreed contingency plans when required
7. take contingency actions in the event of risks or situations of crisis
8. identify, evaluate and resolve any problems or obstacles that arise
9. maintain the continuity of business activities during periods of change
10. monitor progress against your plans and take action in response to any significant variances
11. communicate progress and provide opportunities for people to give feedback
12. provide recognition for colleagues and teams who achieve results
13. check that change management meets the requirements of your organisation
14. engage employees and other stakeholders in evaluating changes
15. evaluate the change process against the success criteria agreed with stakeholders
16. establish the reasons for any failure to meet the success criteria in full
17. assess the impact on those involved in the changes
18. identify any unanticipated benefits or disadvantages arising from the change and the reasons for these
19. review the change process, including any deviations from original plans
20. identify the lessons to be learned for future changes
21. calculate the net value of the change and determine whether it meets the expectations of stakeholders
22. communicate the findings of your evaluation to stakeholders with recommendations for any further changes required
23. the legal, organisational, codes of practice and policies relevant to your role and implementing and evaluating changes

Implement and evaluate change

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage employees and stakeholders in implementing change
2. the main models and methods for managing change effectively, and their strengths and weaknesses
3. the theories of teams, including team-building techniques and how to apply them
4. the types of support and training the colleagues may need to implement and respond to changes
5. how to assess the risks and benefits associated with strategies and plans
6. how to make critical decisions during change implementation
7. the obstacles to change, and the techniques that remove them
8. the different stakeholder expectations and how they influence the process
9. the principles and methods of effective communication and how to apply them
10. how to analyse change processes to identify the causes of success or failure and unanticipated benefits or disadvantages
11. the range of digital technologies required for implementation of change
12. the tools and techniques for evaluation and management of impact of change
13. how to identify lessons to be learned and applied to future change processes
14. how to calculate net value of changes
15. how to formulate and present recommendations

Industry and sector specific knowledge and understanding

16. your organisation's current position in its sector and operating environment, compared with its main competitors, relevant to change programmes
17. the range of information sources that are relevant to the sector in which your organisation operates
18. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

Implement and evaluate change

19. the individuals within your area of work, their roles, responsibilities, competences and potential
20. your organisation's culture, the vision for the future, the reasons for change, the risks and expected benefits
21. your organisation's change plans that have been agreed, how to access them, and the business-critical activities and interdependencies that you are responsible for
22. the factors that need to be changed, and the associated priorities and reasons
23. the importance of being agile in the events of risks or crisis
24. your organisation's communication channels, both formal and informal
25. the change management frameworks and methods used in your organisation
26. your organisation's stakeholders, their interests and expectations

Implement and evaluate change

Skills

1. Analysing
2. Assessing risks
3. Being agile in managing risks or crisis
4. Communicating
5. Contingency planning
6. Decision-making
7. Delegating
8. Evaluating
9. Influencing
10. Information management
11. Involving others
12. Managing conflict
13. Monitoring
14. Motivating
15. Negotiating
16. Obtaining feedback
17. Persuading
18. Planning
19. Presenting information
20. Problem solving
21. Reflecting
22. Reviewing
23. Risk management
24. Stress management
25. Team building
26. Time management
27. Valuing and supporting members of staff

Implement and evaluate change

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Originating Organisation	Instructus
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Original URN	CFAM&LCA4, CFAM&LCA5
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; implement; change
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Overview

This standard is about managing the continuous improvement of the overall performance of your organisation. You set up systems to measure organisational performance and create action plans to make improvements, gathering feedback and ideas from colleagues and customers. The emphasis is on identifying and implementing changes which will add value in the eyes of customers and other key stakeholders.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. engage colleagues and key stakeholders in managing continuous improvement
2. specify valid and reliable measures for evaluating the performance of your organisation
3. set up systems for collecting and assessing information on the overall performance of the organisation
4. identify the cause and effects of problems and changes
5. identify opportunities where performance could be improved using information on the overall performance of the organisation
6. establish an organisational culture where people freely make suggestions for improvements
7. encourage customers, suppliers and other key stakeholders to provide feedback on your organisation's performance and suggest improvements
8. benchmark the performance of your organisation against other comparable organisations
9. identify improvements that are beneficial to your organisation, its customers and other key stakeholders
10. create action plans based on feedback and the benchmarking findings
11. agree continuous improvement actions with decision makers
12. implement actions to improve organisational performance
13. share knowledge and understanding of how improvements have, or can be made, across your organisation
14. check that any improvements made are aligned to the organisation's vision and objectives
15. show that the improvements made reduce the gap between what your customers and key stakeholders want, and what your organisation's products, services and processes deliver
16. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to manage continuous improvement

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. how to engage colleagues and other stakeholders in managing continuous improvement
2. the principles which support organisational improvement
3. how to establish systems and measures for collecting and assessing information on the overall performance of the organisation and how to use the findings to identify opportunities where organisational performance could be improved
4. how to benchmark the performance of your organisation against others and take actions based on the findings
5. the importance of receiving feedback from customers and suppliers on your organisation's performance, and how to obtain and analyse this feedback
6. the importance of developing a culture that continually improves and how to involve others in achieving this
7. the importance of finding out the cause and effects of problems and changes
8. the ways of measuring the effect of improvements

Industry and sector specific knowledge and understanding

9. the range of information sources and techniques for collecting information that are relevant to the sector in which your organisation works
10. the trends and developments in the sector related to continuous improvement
11. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to manage continuous improvement

Context specific knowledge and understanding

12. your organisation's vision, objectives, plans, structure, values, culture and key stakeholders
13. how your organisation adds value through the delivery of its products, services and processes
14. your organisation's customers and the value of a customer-focused culture
15. the measures of performance relevant to your own organisation
16. the formal and informal sources of information relevant to your

organisation and how to gather suitable information

Skills

1. Analysing
2. Benchmarking
3. Communicating
4. Decision-making
5. Evaluating
6. Information management
7. Involving others
8. Leadership
9. Planning
10. Presenting information
11. Prioritising
12. Thinking strategically
13. Thinking systematically
14. Thinking with a focus on customers
15. Valuing and supporting members of staff

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Original URN	CFAM&LFE5
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; manager; improvement
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Overview

This standard is about planning the workforce. You engage with stakeholders and specialists to assist with workforce planning. You evaluate your organisation's strategy and plans to identify what is required to deliver them. You also review the current workforce for capacity and capability to deliver and identify learning and development needs. The standard includes checking workforce diversity and developing plans using internal and external specialists. You confirm that employment contracts and resources are in place to meet your organisation's requirements. You also communicate workforce plans and consider contingencies to deal with unforeseen circumstances. This standard is for all managers and leaders.

Plan the workforce

Performance criteria

You must be able to:

1. engage colleagues and key stakeholders in planning workforce requirements
2. confirm specialist resources to assist in workforce planning activities, where necessary
3. evaluate your organisation's strategic objectives and plans to obtain information needed for workforce planning purposes and identify any key issues for further consideration
4. identify the knowledge, skills and competence required to deliver your organisation's strategic objectives and plans
5. review the capacity and capability of the current workforce to meet identified knowledge, skills and competence requirements
6. identify any learning or development needs of the current workforce to meet requirements
7. check that the diversity of the workforce provides a suitable mix of people to achieve its objectives
8. interpret the range of needs of your workforce
9. develop workforce plans that meet the organisation's long, medium, and short-term requirements, making effective use of internal and external specialists
10. check that employment contracts meet the needs of the organisation
11. confirm that resources needed to recruit, develop, retain and redeploy people are available
12. develop contingency plans to deal with unforeseen circumstances and maintain business continuity
13. identify any recurring issues that cause people to leave your organisation and seek to address these
14. communicate workforce plans to colleagues
15. review your workforce plans when required by your organisation, or in the light of changes to your organisation's strategic objectives and plans

Plan the workforce

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage employees and other stakeholders in workforce planning
2. what an effective workforce plan should cover to meet organisational requirements
3. the information required to undertake workforce planning
4. the legislation and requirements relating to employment, workers' welfare and rights, equality and health and safety
5. how to take account of equality, diversity and inclusion issues in workforce planning
6. the strategies and services which need to be in place for when employees leave, including redundancy counselling
7. the importance of putting contingency plans in place and how to do so effectively
8. the different ways in which workforce requirements can be met, their advantages and disadvantages, costs and benefits

Industry and sector specific knowledge and understanding

9. the types of employment contracts typically used within the industry and sector
10. the patterns for employing, recruiting, and retaining employees in the industry and sector
11. the trends and developments in the sector which are relevant to workforce planning
12. the legislation, regulations and codes of practice that apply in the industry and sector
13. the working culture and practices of the industry and sector

Context specific knowledge and understanding

14. the individuals within your organisation, their roles, responsibilities, competences and potential
15. the internal and external specialist resources available for workforce planning and how to make use of them

Plan the workforce

Skills

1. Analysing
2. Communicating
3. Contingency planning
4. Decision-making
5. Evaluating
6. Information management
7. Monitoring
8. Planning
9. Prioritising
10. Reviewing
11. Scenario building
12. Thinking creatively
13. Thinking strategically

Plan the workforce

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Validity	Current
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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LDA1
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; workforce; planning
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Recruit, induct and retain employees into their roles

Overview

This standard is about recruiting, inducting and retaining employees to undertake identified activities or work roles. You review the work required to identify shortfalls in number of employees, their knowledge, skills and competence. You develop job descriptions and specifications for recruitment. You plan and carry out recruitment using agreed selection criteria and make employment offers. You induct staff to your organisation taking their diverse needs into account. This includes supporting them to monitor their own induction progress. You also retain your staff by giving them ongoing opportunities to develop their potential and share any issues so that they can be resolved.

This standard is for all managers and leaders.

Recruit, induct and retain employees into their roles

Performance criteria*You must be able to:*

1. engage colleagues and other stakeholders in recruiting, inducting and retaining staff
2. seek specialist resources, where required
3. review the work required in your area of responsibility
4. identify any shortfalls in number of employees, their knowledge, skills and competence
5. evaluate the options for addressing shortfalls and decide on the best options
6. develop up-to-date job descriptions and person specifications for recruitment
7. plan the recruitment and selection process for identified vacancies, the methods that will be used, the associated timings and who is going to be involved
8. specify and agree criteria for assessing and selecting applicants
9. inform applicants about the progress of their applications, in accordance with organisational policy
10. carry out recruitment in accordance with your plan, using the agreed selection criteria
11. offer positions to applicants who meet the selection criteria
12. provide constructive feedback to unsuccessful applicants, in accordance with organisational policy
13. welcome new staff and explain their roles in achieving the objectives of the organisation and their work area
14. establish employees' needs for information about your organisation, organisational policies and practices, their work roles and people they will work with
15. identify the learning and development needs to enable employees to perform their duties
16. provide an induction programme to meet new staff information, learning and development needs
17. consider employees' needs when designing their induction programmes
18. introduce employees to their colleagues, explaining respective roles and how they will interface
19. encourage employees to take responsibility for monitoring their progress and completing their induction programmes
20. provide support, supervision and feedback to enable employees to perform their roles to your organisation's requirements

Recruit, induct and retain employees into their roles

21. provide work opportunities that challenge employees to make effective use of their knowledge, skills and competences to develop their potential
22. review employees' performance and development systematically and provide constructive feedback
23. recognise employees' performance and their achievements in line with your organisation's policy
24. support employees to access the career and professional development opportunities within your organisation
25. provide opportunities for employees to discuss issues about their work or development with you
26. identify when employees are dissatisfied and agree solutions that meet the individual and organisational needs
27. identify when employees' values, motivations and aspirations are incompatible with your organisation's vision, objectives and values and seek alternative solutions with the employees concerned
28. meet with employees planning to leave your organisation and resolve any issues or misunderstandings
29. evaluate the recruitment, induction and retention process to identify any areas for improvements
30. follow the legal, organisational, codes of practice and policies relevant to recruiting, inducting and retaining staff

Recruit, induct and retain employees into their roles

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. how to review the workload in your area to identify shortfalls in number of employees, their knowledge, skills and competence
2. how to identify actual skills and avoid stereotyping of skills levels and work ethics
3. the different options for addressing identified shortfalls and their advantages and disadvantages
4. what job descriptions and person specifications should cover and why it is important to consult with others in producing or updating them
5. the different stages in the recruitment and selection process
6. why it is important to consult with others on the stages, recruitment and selection methods to be used, associated timings and who is going to be involved
7. the different recruitment and selection methods and their associated advantages and disadvantages
8. why it is important to give clear information on vacancies to potential applicants
9. how cultural differences in language, body language, tone of voice and dress can differ from expectations and how to avoid bias
10. how to measure applicants' competence and capability against agreed criteria and assess whether they meet the stated requirements of the vacancy
11. the importance of keeping applicants informed about progress and how to do so
12. how to provide clear and constructive feedback to unsuccessful applicants
13. the purpose and importance of a structured induction programme and what an induction programme should cover to take account of employees' needs
14. how to encourage employees to take responsibility for their progress using active listening and questioning techniques
15. how and when to review employees' progress towards achieving the objectives in their induction programmes
16. how to identify employees' information, learning and development needs
17. the importance of recognising individual performance and how to

Recruit, induct and retain employees into their roles

do so

18. the importance of providing support and opportunities for employees to discuss issues with you

19. the alternative solutions that may be deployed when employees' values, motivations and aspirations are incompatible with their work or your organisation's vision, objectives and values

20. the importance of understanding the reasons why employees are leaving an organisation

21. the importance of evaluating the effectiveness of selection, induction and retention processes and the ways to obtain feedback to identify areas for improvement

Industry and sector specific knowledge and understanding

22. the recruitment and selection issues and specific initiatives and arrangements within the industry and sector

23. the relevant employment practices in your sector and the legal, organisational, codes of practice and policies in relation to recruiting, inducing and retaining staff

Context specific knowledge and understanding

24. the variety of needs of employees, their roles, responsibilities, competences and potential

25. the job descriptions and person specifications for confirmed vacancies

26. the local employment market conditions and the staff turnover rate in your area

27. your organisation's structure, values and culture and the agreed operational plans and changes to work requirements in your area

28. the specialist resources available to support recruitment, induction and retention, and how to make use of them

29. the training and development opportunities and resources available

30. the legal and employment policies and practices within your organisation, including recruitment, selection, induction, development, promotion, retention, redundancy, dismissal, pay and other terms and conditions

Recruit, induct and retain employees into their roles

Skills

1. Communicating
2. Consulting
3. Decision-making
4. Evaluating
5. Evaluating
6. Information management
7. Inspiring
8. Interviewing
9. Involving others
10. Monitoring
11. Negotiating
12. Obtaining feedback
13. Planning
14. Presenting information
15. Prioritising
16. Problem solving
17. Providing feedback
18. Reviewing
19. Team building
20. Valuing and supporting members of staff

Recruit, induct and retain employees into their roles

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Status	Original
Originating Organisation	Instructus
Original URN	CFAM&LDA2, CFAM&LDA3
Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; recruit; select; retain; people

Manage the redeployment of employees to new roles

Overview

This standard is about redeploying employees to new roles. You develop redeployment plans in accordance with your organisation's policies and procedures. You identify the need for redeployment based on business needs and communicate the reasons for this. You define and apply selection criteria to make fair decisions. The standard includes making redeployment offers to employees and justifying the changes that are necessary. These changes may concern their job roles, levels of responsibilities or working arrangements, especially where remote working is required. You show empathy to employees' perspectives and provide confidential support for them. You evaluate the redeployment process and make recommendations for improvements.

This standard is for all managers and leaders.

Manage the redeployment of employees to new roles

Performance criteria

You must be able to:

1. engage colleagues and other stakeholders in developing plans for redeploying employees
2. comply with your organisation's redeployment policies and procedures
3. use internal and external specialist resources, where required
4. identify the business need to redeploy employees to different roles, areas of the organisation or locations
5. define specific, fair criteria for selecting individuals for redeployment
6. apply the selection criteria objectively to identify those individuals to be redeployed
7. communicate the reasons for redeployment to those affected making the decision-making criteria transparent
8. make redeployment offers to individuals, specifying the new job specification, levels of responsibility, location and reporting arrangements
9. justify any changes in salary, benefits or other terms and conditions including any relocation allowances or remote working arrangements
10. confirm the date by which the offer must be accepted or rejected, and the alternatives if the offer is not accepted
11. identify colleagues' needs, feelings and motivations related to redeployment of themselves and their colleagues
12. provide support to individuals being redeployed showing interest in their concerns
13. protect the confidentiality and security of information following organisational procedures
14. arrange induction, support, supervision and feedback to enable individuals to perform in their new roles
15. evaluate the redeployment process with those involved
16. identify any areas for improvement to the redeployment process and make recommendations
17. follow the legal, organisational, codes of practice and policies relevant to your role and managing the redeployment of employees

Manage the redeployment of employees to new roles

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage employees and other stakeholders in redeployment processes
2. the principles and methods of effective communication and how to apply them
3. how to establish fair and clear criteria for redeployment
4. how to match redeployed employees to different roles, areas of the organisation and/or locations
5. the content that is required in redeployment offers
6. the importance of arranging and providing induction, support, supervision and feedback to individuals being redeployed and how to do so
7. the importance of evaluating the effectiveness of redeployment processes and identifying areas for improvement

Industry and sector specific knowledge and understanding

8. the consultation requirements in your industry and sector
9. the employment practices in your industry and sector
10. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

11. your organisation's redeployment policies and procedures
12. the specialist resources available to support redeployment processes and how to access and use them
13. the need for redeploying employees
14. how to communicate redeployment decisions to individuals and empathise with their needs, feelings and motivations
15. the relevant working arrangements or changes in location
16. the employment contracts with employees working at your organisation
17. the employees within your area of work, their roles, responsibilities, competences and potential
18. your own role, responsibilities and level of authority
19. the legal, organisational, codes of practice and policies relevant to your role and managing the redeployment of employees

Manage the redeployment of employees to new roles

Skills

1. Communicating
2. Consulting
3. Decision-making
4. Empathising
5. Evaluating
6. Information management
7. Involving others
8. Managing conflict
9. Negotiating
10. Planning
11. Presenting information
12. Reviewing
13. Thinking systematically
14. Valuing and supporting others

Manage the redeployment of employees to new roles

Developed by	Instructus
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Version Number	1
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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LDA4
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; managing; deployment; people
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Overview

This standard is about managing redundancies. You seek support from colleagues and specialists to manage staff redundancies. You outline the consultation process to staff and justify the reasons that redundancies are required. You inform staff about the decisions related to redundancies and speak to the employees affected. You also keep other staff up to date to maintain their confidence and morale during the consultant process. The standard includes maintaining records and evaluating the redundancy process to identify improvements. This standard is for all managers and leaders.

Manage redundancies

Performance criteria

- You must be able to:*
1. seek support from colleagues or human resources specialists to manage redundancies when required
 2. provide accurate information on your organisation's redundancy policy and the appeals procedure to staff in your area of responsibility
 3. justify the reasons for the redundancies
 4. outline the consultation process for the redundancies with staff and their representatives
 5. confirm the number of employees being dismissed for reasons of redundancy
 6. outline the methods and criteria used to select employees for redundancy
 7. provide information about the alternative employment opportunities
 8. specify the learning opportunities, counselling or support available
 9. confirm the process and timescale for the redundancies
 10. confirm the method of calculating any redundancy payments
 11. inform employees selected for dismissal for reasons of redundancy clearly, considerately and confidentially
 12. interview employees being dismissed for reasons of redundancy to understand their experience of working in the organisation and of the redundancy process itself
 13. demonstrate empathy with staff needs, feelings and motivations and take an active interest in their concerns
 14. maintain the confidence and morale of remaining staff by sharing information about the process, in line with your organisation's confidentiality requirements
 15. comply with your organisation's redundancy policy and current legislation throughout the process
 16. maintain accurate records of the redundancy process and store these confidentially following organisational procedures
 17. evaluate the redundancy process with colleagues or human resources specialists
 18. identify areas for improvements in the redundancy process

Manage redundancies

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to break news to staff selected for redundancy dismissal and the importance of communicating information clearly, concisely, considerately and confidentially
2. the importance of providing learning opportunities, counselling and support; both for employees selected for redundancy dismissal and those who remain in employment
3. how to demonstrate empathy with staff needs, feelings and motivations during redundancy consultation
4. the importance of complying fully with your organisation's redundancy policy and current legislation throughout the process
5. the importance of keeping employees who remain in employment informed about the process, without breaching confidentiality, and how to do so in ways that maintain their confidence and morale

Industry and sector specific knowledge and understanding

6. the industry and sector requirements for managing redundancies
7. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Context specific knowledge and understanding

8. your organisation's redundancy policy and appeals procedure
9. the sources of advice, guidance and support from colleagues or human resources specialists
10. the reasons why it is necessary to make redundancies
11. the numbers of employees being dismissed for reasons of redundancy
12. the methods and criteria for selecting employees for redundancy
13. the consultation process and timescales for the redundancies
14. the methods for calculating any redundancy payments
15. the redundancy consultation that has taken place with staff and their representatives
16. the alternative employment opportunities and how to decide which opportunities would be appropriate to offer to employees
17. the counselling available for employees selected for dismissal for reasons of redundancy or for those who remain in employment
18. your organisation's procedures for keeping accurate records in line with confidentiality and data protection policies

Manage redundancies

Skills

1. Acting assertively
2. Balancing competing needs and interests
3. Communicating
4. Decision-making
5. Empathising
6. Evaluating
7. Information management
8. Interviewing
9. Leadership
10. Leading by example
11. Managing conflict
12. Monitoring
13. Motivating
14. Obtaining feedback
15. Planning
16. Presenting information
17. Providing feedback
18. Stress management
19. Valuing and supporting members of staff

Manage redundancies

Developed by	Instructus
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Version Number	1
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Originating Organisation	Instructus
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Original URN	CFAM&LDA5
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; managing; redundancies
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Overview

This standard is about following your organisation's disciplinary and grievance procedures in response to misconduct or unsatisfactory performance of team members and their complaints. You inform your team about the standards of performance, conduct what is expected of them, and your organisation's disciplinary and grievance procedures. You ask colleagues, human resources and legal specialists for support when required. You investigate misconduct and unsatisfactory performance to establish the facts, resolving cases informally when they are minor. You respond to grievances by investigating them further and resolving them. The standard includes using your organisation's formal procedures to resolve serious grievances and disciplinary cases. You also maintain records in accordance with your organisation's and legal requirements.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. inform employees about the standards of conduct and performance expected of them
2. identify your organisation's procedures for dealing with misconduct or unsatisfactory performance
3. seek support from colleagues, human resources or legal specialists on implementing disciplinary and grievance procedures when required
4. investigate and establish the facts relating to team members misconduct or unsatisfactory performance
5. resolve cases of minor misconduct or unsatisfactory performance informally
6. follow your organisation's formal disciplinary procedure in serious cases of misconduct or unsatisfactory performance
7. share your organisation's procedure for raising grievances with your team
8. identify potential grievances and take preventative measures to resolve issues where possible
9. recognise the role of employee representatives such as trade unions and ensure that they are included in the process
10. use an informal approach to resolve employee concerns, problems and complaints where possible
11. follow your organisation's formal grievance procedures if an employee raises a grievance in writing
12. maintain records related to disciplinary and the grievance processes and store these confidentially in line with organisational procedures
13. evaluate your organisation's disciplinary and grievance procedures to identify improvements
14. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. the importance of informing employees about the standards of conduct and performance expected, and the current procedure for raising grievances
2. how to carry out investigations to establish facts relating to any misconduct or unsatisfactory performance, and grievances
3. the informal approaches to dealing with cases of minor misconduct or unsatisfactory performance, and concerns, problems or complaints raised with you, and when this type of approach is likely to resolve the situation effectively
4. the differences between misconduct, gross misconduct and unsatisfactory performance, and how each should be handled
5. the importance of following your organisation's formal disciplinary and grievance procedures in serious cases of misconduct or unsatisfactory performance, and grievances
6. the importance of recognising the role of employee representatives such as trade unions and ensuring they are included in the process
7. how to conduct a formal meeting with an employee to discuss their grievance, misconduct or unsatisfactory performance
8. how to gather feedback about disciplinary and grievance procedures to evaluate them and make recommendations for improvements

Industry and sector specific knowledge and understanding

9. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out
10. the industry and sector requirements for supporting employees to improve their performance

Context specific knowledge and understanding

11. your organisation's standards of conduct and performance expected of employees and the procedures for dealing with misconduct or unsatisfactory performance
12. your organisation's procedure for dealing with grievances
13. your knowledge, skills and competence and the sources of advice, guidance and support available from colleagues, human resources or legal specialists

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14. your organisation's requirements for keeping records throughout disciplinary and grievance processes and how store these in line with legislation and procedure

Skills

1. Acting assertively
2. Assessing
3. Communicating
4. Decision-making
5. Empathising
6. Information management
7. Interviewing
8. Monitoring
9. Presenting information
10. Providing feedback
11. Questioning
12. Reporting
13. Reviewing

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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LDA6, CFAM&LDA7
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; initiate; disciplinary; procedure
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Build teams and allocate work to team members

Overview

This standard is about building teams and allocating work to team members, including set up for a particular project and ongoing teams. You specify the purpose of teams and their expertise, skills and attitudes required to achieve them. You ensure that the work required of your teams is allocated amongst team members, taking account of their skills, knowledge and competence, their workloads and opportunities for personal development. You encourage your teams to collaborate and build respect for the strengths and expertise that each employee brings. You encourage creative problem solving and feedback to enhance team and individual performance. You also celebrate individual and team successes and refocus energy when things go wrong.

This standard is for all managers and leaders.

Build teams and allocate work to team members

Performance criteria

You must be able to:

1. specify the purpose of teams and what they must achieve
2. define the expertise, knowledge, skills and attitudes required to achieve team purpose
3. identify team members' knowledge, skills and competences to determine their roles within the teams
4. plan and develop any knowledge, skills and competences lacking in the teams
5. develop and implement succession and knowledge and skills transfer plans, where required
6. confirm the work required of teams with your manager and seek clarification on any outstanding points and issues
7. plan how teams will undertake the work, identifying any priorities or critical activities and making effective use of the available resources
8. allocate work to team members by taking account of their skills, knowledge, competence, backgrounds and experience
9. analyse team members existing workloads, and opportunities for their development
10. brief team members on the work they have been allocated and the standard of performance expected
11. encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated
12. respond to any concerns team members may have about their work
13. demonstrate behaviours that show and inspires team members to show, respect, helpfulness and cooperation
14. agree the behaviours that will help achieve team purpose and those likely to hinder progress with team members
15. support team members to understand their unique contribution to teams, the contributions of fellow team members, and how these complement each other
16. provide opportunities for team members to get to know each other's strengths and weaknesses and build mutual respect and trust
17. allow time for teams to develop through their stages of growth
18. support the team to seize opportunities presented by team member changes and the introduction of new members

Build teams and allocate work to team members

19. encourage team members to share problems with each other and solve these creatively together
20. encourage open communication between team members, including providing constructive feedback to enhance the performance of individual members and the whole team
21. monitor the performance of teams to evaluate how well its purpose is being achieved
22. celebrate team and individual successes together
23. identify conflicts, acknowledge the feelings and views of all parties, and redirect energy towards a common goal
24. dissolve teams once their purpose has been achieved and they are no longer required
25. follow the industry legal, organisational, codes of practice and policies relevant to building teams and allocating work

Build teams and allocate work to team members

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of confirming and clarifying the work required of teams with your manager and how to do this
2. how to identify the scope of knowledge, skills and competence required to achieve the purpose of teams
3. the importance of selecting team members with the required knowledge, skills, competence and different personalities so they can play complementary roles within teams, and how to do so
4. the succession and knowledge and skills transfer planning
5. the importance of agreeing with team members the behaviours that are likely to help achievement of team purpose and those that are likely to hinder progress and should be avoided
6. how to help team members to understand their unique contribution to team purpose
7. the contributions expected of team members and how these compliment and support each other
8. the importance of providing opportunities for team members to get to know each other's strengths and weaknesses to build mutual respect and trust
9. the importance of encouraging open communication between team members, and how this supports collaboration
10. how to provide feedback to team members to enhance the performance of fellow team members and the team as a whole
11. the importance of allowing time for teams to develop through its stages of growth, and how to do so
12. the importance of celebrating team and individual successes together and commiserating together when things go wrong
13. the different ways of communicating with members of teams and refocusing the energy on achieving its purpose
14. how to plan the work of teams, including how to identify any priorities or critical activities and the available resources
15. why it is important to allocate work across teams and how to do so
16. 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
17. the ways of encouraging team members to ask questions, seek

Build teams and allocate work to team members

clarification and make suggestions in relation to the work which they have been allocated

18. the concerns team members may have about their work and how to address these concerns

Industry and sector specific knowledge and understanding

19. the industry and sector legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

20. the industry and sector requirements for the development or maintenance of knowledge, skills and competence.

Context specific knowledge and understanding

21. the purpose and objectives of your teams, the plans for undertaking the required work and the resources required

22. the required mix of expertise, knowledge and skills to achieve teams' purpose

23. the work required of your teams and your organisation's standards or levels of expected performance

24. the backgrounds and experience of team members, their knowledge, skills, competence and workloads

25. the opportunities for team members' development and your organisation's policy and procedures for personal and professional development

26. the reporting lines in your organisation and the limits of your authority

Build teams and allocate work to team members

Skills

1. Acting assertively
2. Communicating
3. Decision-making
4. Empowering
5. Evaluating
6. Involving others
7. Leadership
8. Monitoring
9. Obtaining feedback
10. Planning
11. Presenting information
12. Problem solving
13. Providing feedback
14. Reviewing
15. Setting objectives
16. Team building
17. Valuing and supporting others
18. Communicating
19. Decision-making
20. Delegating
21. Empowering
22. Information management
23. Leading by example
24. Monitoring
25. Planning
26. Presenting information
27. Prioritising
28. Problem solving
29. Reporting
30. Setting objectives
31. Team building
32. Time management
33. Valuing and supporting members of staff

Build teams and allocate work to team members

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Original URN	CFAM&LDB1, CFAM&LDB2
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; build; teams
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Manage and quality assure work in your team

Overview

This standard is about managing and quality assuring work in your team. You plan how objectives will be achieved by considering existing workloads and the skills and experience that your team members have. You agree individual objectives and the quality of work required, checking that employees are committed to achieving them. You also provide resources, support and feedback to maintain and improve performance. The standard includes reviewing plans and communicating changes to those affected when required. You monitor work outputs against your organisation's quality standards and motivate your team, recognising their achievement of objectives. This standard also covers resolution of issues, disagreements or conflicts as part of managing the team.

This standard is for all managers and leaders.

Manage and quality assure work in your team

Performance criteria

You must be able to:

1. communicate the standards of work and behaviours expected from team members
2. help team members understand how the roles of different team members interface, complement and support each other
3. plan how overall objectives can be achieved, identifying any priorities or priority activities
4. review employees' existing workloads to make the best use of the available resources
5. delegate responsibilities to employees on a fair basis taking account of their skills, knowledge and competence, backgrounds and experience
6. identify opportunities for employees' development
7. agree smart (specific, measurable, agreed, realistic and time-bound) objectives with employees, including the standard of performance expected
8. agree with employees how and when progress towards, and achievement of, objectives will be monitored, reviewed and evaluated
9. check that employees are committed to achieving their objectives and understand their unique contribution to team and organisational objectives
10. discuss and agree effective methods for achieving individual objectives and the resources, support and supervision required
11. provide employees with the resources, support and supervision agreed
12. monitor progress against objectives and evaluate performance against the standard expected at agreed times
13. provide employees with constructive feedback to maintain and improve their performance
14. identify any unsatisfactory performance, discuss the causes and agree ways of improving performance with the employees concerned
15. recognise successful achievement of objectives in line with your organisation's policy
16. review plans, responsibilities and objectives as agreed and following any significant changes to organisational plans and objectives
17. communicate plans, responsibilities and objectives and any

Manage and quality assure work in your team

- changes to those affected
18. check the quality of team members work outputs against the standard of performance expected
 19. motivate team members to complete their allocated work on time and to the quality standard required
 20. provide additional support and resources team members require to complete their work on time and to the quality standard required
 21. motivate team members to maintain and continuously improve their performance
 22. use information collected on the performance of team members in formal appraisals of performance
 23. identify potential conflicts between team members and take preventative action to avoid these
 24. encourage team members to resolve their own problems and conflicts amongst themselves
 25. manage conflicts when the team members concerned are not able to resolve the conflicts themselves
 26. acknowledge and show respect for team members' emotions regarding the conflict and manage any negative emotions
 27. investigate the causes of the conflict, giving all parties opportunities to present the facts and their perceptions about the conflict
 28. agree with team members how to resolve the conflict, without apportioning blame
 29. accept help from colleagues or specialists, where necessary
 30. maintain complete, accurate and confidential records of conflicts and their outcomes, in line with organisational policy
 31. follow the industry legal, organisational, codes of practice and policies relevant to your role in managing and quality assuring the work of your team

Manage and quality assure work in your team

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. how to plan to meet objectives, identify priorities and critical issues, and the methods, resources, support and supervision necessary for achieving objectives
2. how to develop Specific, Measurable, Achievable, Realistic and Time-bound (SMART) objectives, delegate fairly and clarify the standards of performance required with employees
3. how to gain employees' commitment to their objectives including how to develop and agree a plan for monitoring, reviewing and evaluating individual progress and achievement of objectives
4. how to take cultural differences into account when managing individual performance
5. how to provide employees with constructive feedback to maintain and improve their performance
6. the importance of identifying and addressing unacceptable or poor performance, and how to do so
7. the importance of reviewing objectives and performance regularly, and how to do so
8. how to select and apply different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and continuously improve their performance
9. how to select and apply different methods for recognising team members' achievements
10. the importance of identifying potential conflicts between team members, taking preventative action to avoid these, and how to do so
11. the importance of giving team members opportunities to discuss serious problems that directly or indirectly affect their work, and how to encourage team members to do so
12. the importance of taking prompt action to bring up and deal with conflicts when they arise if the team members concerned are unable to resolve the conflicts themselves
13. the ways of dealing with conflicts when they arise, what types of action should be taken and when
14. the importance of acknowledging and showing respect for team members' emotions about the conflict and how to manage any negative emotions

Manage and quality assure work in your team

15. how to remain impartial when identifying the causes of the conflict, giving all parties opportunities to present the facts and their perceptions about the conflict

16. the importance of identifying and agreeing with team members how to resolve the conflict, without apportioning blame, and how to do so

17. the additional support and resources which team members might require to help them complete their work on time and to the quality standard required and how to assist in providing this

Industry and sector specific knowledge and understanding

18. the industry and sector requirements for the development or maintenance of knowledge, skills and competences

19. the industry and sector specific legislation, regulations, guidelines, codes of practice relating to managing and quality assuring work

Context specific knowledge and understanding

20. the standards of work and behaviour expected of your team members

21. how to help your team understand how the roles of different team members interface, complement and support each other

22. the employees within your area of responsibility, their roles, responsibilities, competences and potential

23. the objectives for your area of responsibility

24. the planned work for your area of responsibility and the available resources for undertaking the required work

25. your organisation's quality standards or level of expected performance

26. your organisation's policies and procedures for dealing with poor performance

27. your organisation's grievance and disciplinary policies and procedures

28. your organisation's performance appraisal systems and reward policies and procedures

29. your organisation's policies and procedures for personal and professional development

30. your organisation's requirements for resolving conflicts and maintaining records of conflicts and their outcomes

31. the reporting lines in your organisation and the limits of your authority

Manage and quality assure work in your team

Skills

1. Acting assertively
2. Communicating
3. Decision-making
4. Delegating
5. Empowering
6. Evaluating
7. Involving others
8. Leadership
9. Managing conflict
10. Monitoring
11. Motivating
12. Planning
13. Presenting information
14. Prioritising
15. Problem solving
16. Providing feedback
17. Reviewing
18. Setting objectives
19. Team building
20. Valuing and supporting members of staff

Manage and quality assure work in your team

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Originating Organisation	Instructus
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Original URN	CFAM&LDB4
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; manage; performance at work
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Manage team communications

Overview

This standard is about managing team communications in your own team and between different teams. It includes supporting employees who work remotely or at different locations to communicate and feel part of a team. You confirm the information that your team requires and the information provided to internal and external teams. You select the communication media and styles that your team will use, and methods that match the requirements of your organisation's targets, resources and available technologies. You monitor communication and provide support to your team for any issues that arise. The standard also includes reviewing the resource requirements for remote, virtual teams, identifying, developing and maintaining tools and process to support work. You provide guidelines and facilitate collaboration, encouraging team members to share information. You also evaluate the effectiveness of team communications to identify and plan actions for improvement.

This standard is for all managers and leaders.

Manage team communications

Performance criteria

You must be able to:

1. confirm the information your team requires from you, other team members and other teams, and when they need it
2. discuss the preferred communication media and styles for different employees and situations in your team
3. agree the information your team need to provide to you, other team members and other teams, and when they need to provide it
4. outline when your team should discuss their work and issues with you, other team members and other teams
5. select the media and styles of communication that will be used
6. agree team communication methods which meet their needs and match organisational targets, resources, and available technology
7. agree the individual team contacts for specific work activities
8. agree the communication methods to be used in urgent or exceptional circumstances
9. provide information to your team as and when they need it
10. monitor that your team provide you, other team members and other teams with the information they need, when they need it
11. provide opportunities for team members to discuss their work and issues arising with you
12. identify the key communication challenges for remote, virtual workers with stakeholders
13. review the resource requirements for providing communication tools and processes for remote, virtual working with stakeholders
14. identify, develop and maintain effective tools and processes to support remote, virtual teams
15. identify networks, processes and systems that allow employees to connect to information and knowledge remotely
16. provide guidelines, training, coaching and support to facilitate and encourage effective use of communication tools and processes
17. provide guidelines to facilitate interactive collaboration between internal and external stakeholders
18. encourage others to share information and knowledge within the constraints of confidentiality
19. check that team members understand and adhere to regulatory, professional and commercial requirements
20. resolve records management issues arising from communication and remote/virtual working
21. evaluate the effectiveness of communication methods with team

Manage team communications

- members and other teams to identify improvements
- 22. plan actions to sustain or improve effective communication
- 23. follow the industry legal, organisational, codes of practice and policies relevant to your role in managing team communications

Manage team communications

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the principles and methods of effective communication and how to apply them
2. the range of media (e.g. face-to-face, paper, telephone, e-mail, internet) and styles of communication (e.g. written, spoken, visual, demonstration) that can be used and their features, advantages and benefits
3. the technologies that can support team communication and how to use them
4. how to discuss and agree communication needs with team members and other teams (internal and external)
5. how to review the effectiveness of communication methods with team members and other teams (internal and external)
6. the importance of providing team members with opportunities to discuss their work and issues arising, and how to do so
7. the range of tools and techniques available to support remote, virtual working, including face- to-face and technology-enabled solutions
8. how to enable the management of information resources for remote and virtual teams
9. how remote, virtual working interfaces with core business processes
10. the records, information and knowledge management issues that may arise from team and virtual working and how to resolve them

Industry and sector specific knowledge and understanding

11. the industry legal, organisational, codes of practice and policies relevant to your role in managing team communications

Context specific knowledge and understanding

12. the types of communication needs that your team have, individually and collectively, to deliver the organisational objectives set
13. the internal and external teams that your staff communicate with to get information, including when and how they access this
14. why, how and when your team provides information to other teams and each other
15. the importance of receiving and providing information when it is required and the implications when communication breaks down

Manage team communications

16. your organisation's working practices and how these affect teams, virtual teams and remote workers
17. the employees in your area of work, their roles, responsibilities, competences and potential
18. your organisation's requirements for reporting and providing information
19. the technologies and other resources available within your organisation that can facilitate communication, and the strengths and challenges of using them
20. the team members who should be contacted for specific purposes
21. the types of urgent or exceptional communication circumstances that may arise and how to deal with these

Manage team communications

Skills

1. Communicating
2. Decision-making
3. Empowering
4. Evaluating
5. Information management
6. Innovating
7. Involving team members
8. Monitoring
9. Motivating
10. Networking
11. Obtaining feedback
12. Problem solving
13. Reflecting
14. Reviewing
15. Team building
16. Thinking creatively
17. Thinking strategically
18. Valuing and supporting members of staff

Manage team communications

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Date Approved	February 2021
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Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFAM&LDB5, CFAM&LDB6
Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; manage; communications; within teams

Manage flexible and remote working arrangements

Overview

This standard is about managing flexible and remote working arrangements. You develop and manage flexible working arrangements through consultation with stakeholders. You match your organisation's strategy and values to flexible working arrangements that support the business and employees. You introduce flexible working, checking that the agreements made are compatible with the team and objectives. The standard includes providing information to staff and considering requests for flexible and remote working. You give specific reasons for refusing requests, and manage any associated appeals, drawing on specialist support when required. You review flexible and remote working policies and arrangements and recommend improvements. You use relevant tools and technologies for managing different teams, including office-based, dispersed, remote or hybrid. This standard is for all managers and leaders.

Manage flexible and remote working arrangements

Performance criteria

You must be able to:

1. consult staff, their representatives and other stakeholders in developing and managing flexible and remote working arrangements
2. use relevant tools and technologies for managing different teams, including office-based, dispersed, remote or hybrid
3. evaluate the range of flexible and remote working arrangements and identify those which are consistent with the nature of your organisation's business, its strategy and values
4. evaluate opportunities to introduce flexible and remote working arrangements to support business processes and the achievement of objectives
5. consider the impact of flexible and remote working arrangements on your own work activities, the management of your area and other parts of your organisation
6. introduce flexible and remote working arrangements in consultation with staff, their representatives and other key stakeholders
7. confirm that flexible and remote working arrangements are compatible with the workload of the team and the achievement of objectives
8. provide your organisation's flexible and remote working policy to staff
9. confirm that staff understand their rights under flexible and remote working legislation and the flexible working arrangements
10. consider requests for flexible and remote working from staff and seek to accommodate these, where possible
11. agree to trial and review flexible and remote working arrangements, when required
12. state specific reasons if you decide to refuse a flexible and remote working request, ensuring these reasons are consistent with your organisation's policy and legal requirements
13. manage appeals to decisions to refuse a flexible and remote working request in line with your organisation's policy and legal requirements
14. arrange support from specialists, where necessary
15. review flexible and remote working arrangements to recommend improvements
16. follow the industry legal, organisational, codes of practice and

Manage flexible and remote working arrangements

policies relevant to your role in managing flexible and remote working

Manage flexible and remote working arrangements

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage members of staff, their representatives and other stakeholders in developing, managing and reviewing flexible and working arrangements
2. the range of flexible and remote working arrangements (full time, part time, flexi-time, time off in lieu, job sharing, annual hours, etc) and where employees work (home working, tele-working, hot-desking, etc).
3. the relevant tools and technologies for managing different teams, including office-based, dispersed, remote or hybrid
4. the features and benefits of flexible and remote working to individuals and organisations
5. the principles, methods and technologies of communication
6. how to consult with staff, their representatives and other key stakeholders about flexible and remote working arrangements
7. how to evaluate requests for flexible and remote working and identify ways of accommodating these
8. the importance of considering requests for flexible and remote working from a whole team impact perspective
9. the legitimate reasons for refusing requests for flexible and remote working and how to give feedback on decisions to individuals

Industry and sector specific knowledge and understanding

10. the industry and sector requirements for consultation with employees and their representatives
11. follow the industry legal, organisational, codes of practice and policies relevant to your role in managing flexible and remote working

Context specific knowledge and understanding

12. the employees within your area of work, their roles, responsibilities, competences and potential
13. your organisation's flexible and remote working policy and the flexible working arrangements available within this policy
14. your organisation's business, strategy and values and how flexible working can support the achievement of objectives
15. your organisation's stakeholders, their interests and commitment to flexible and remote working
16. the sources of internal and external specialist support available to you within your role to make decisions and deal with appeals related to

Manage flexible and remote working arrangements

flexible and remote working

Manage flexible and remote working arrangements

Skills

1. Problem solving
2. Team building
3. Thinking creatively
4. Valuing and supporting members of staff

Manage flexible and remote working arrangements

Developed by	Instructus
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Version Number	1
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Validity	Current
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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LDB7
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; manage; flexible working
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Promote and manage staff wellbeing

Overview

This standard is about promoting and managing the wellbeing of your staff. You review your organisation's key indicators to understand the levels of wellbeing in your organisation. You create plans and implement initiatives to promote and manage employee wellbeing. You also check that workloads are achievable within the available working hours and provide support to assist staff to fulfil their responsibilities. You provide opportunities for staff to talk about wellbeing and discuss problems with them. The standard includes consulting with internal and external sources of expertise and referring individuals for specialist support to alleviate problems affecting their wellbeing.

This standard is for all managers and leaders.

Promote and manage staff wellbeing

Performance criteria

You must be able to:

1. engage staff, their representatives and other stakeholders in promoting staff wellbeing
2. review key indicators to identify patterns and trends
3. analyse the available quantitative and qualitative data to determine levels of staff wellbeing
4. review current research and ideas related to staff wellbeing
5. create plans to improve staff wellbeing based on your analysis
6. identify areas of your organisation that create support to develop a wellbeing culture
7. implement specific initiatives to enhance staff wellbeing in identified areas
8. check that objectives and workloads of staff are achievable within the working hours available
9. provide staff with the training, support and supervision they need to be able to fulfil their responsibilities effectively both now and, in the future,
10. provide opportunities for teams to talk about their wellbeing
11. discuss problems affecting wellbeing with individual staff
12. respect individual confidentiality in relation to information sharing or addressing the issues and problems
13. identify when staff have problems affecting their wellbeing and take action to alleviate the problems, where possible
14. consult with specialists, where their problems are outside your area of competence or authority
15. refer staff to specialists, when required
16. follow the industry legal, organisational, codes of practice and policies relevant to your role in promoting and managing staff wellbeing

Promote and manage staff wellbeing

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. how to engage staff, their representatives and other key stakeholders in promoting staff wellbeing
2. the key indicators (such as attendance, retention, working hours, productivity, job satisfaction, innovative suggestions) and measures of staff wellbeing
3. the quantitative data (such as absenteeism, staff turnover, accident records, overtime) which can be used to evaluate levels of staff wellbeing
4. the qualitative information (such as supervisory meetings, appraisals, exit interviews, staff surveys, body language) which can be used to evaluate levels of staff wellbeing
5. how to analyse quantitative data and qualitative information to determine levels of staff wellbeing
6. the initiatives that can be implemented to reduce stress and enhance staff wellbeing
7. how to calculate achievable objectives and workloads for staff
8. the importance of providing staff with opportunities to discuss issues affecting their wellbeing
9. how to recognise signs that staff are having problems affecting their wellbeing
10. the actions you can take to alleviate problems affecting staff wellbeing

Industry and sector specific knowledge and understanding

11. the industry and sector requirements for enhancing staff wellbeing
12. the industry legal, organisational, codes of practice and policies relevant to your role in promoting staff wellbeing

Context specific knowledge and understanding

13. the data available in your organisation that can inform an assessment of staff wellbeing
14. why it is important to confirm with confidentiality while sharing or receiving information about individual issues or problems
15. the individuals within your area of work, their roles, responsibilities, competences and potential
16. the internal and external sources of specialist expertise (such as HR staff, mental health first aiders, employee assistance programmes,

charities, local support groups)

Promote and manage staff wellbeing

Skills

1. Communicating
2. Empathising
3. Evaluating
4. Leadership
5. Leading by example
6. Obtaining feedback
7. Planning
8. Problem solving
9. Reviewing
10. Risk management
11. Setting objectives
12. Stress management
13. Team building
14. Valuing and supporting members of staff

Promote and manage staff wellbeing

Developed by	Instructus
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Version Number	1
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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LDB9
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; enhance; staff wellbeing
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Support employees' learning and development

Overview

This standard is about supporting employees' learning and development. You promote a learning culture and encourage employees to seek and learn from feedback. You help employees to identify the knowledge, skills and competence they need to develop in to meet the demands of their current and future work roles, and to fulfil their personal aspirations. You agree development plans and enable employees to undertake learning and development to meet their objectives. You also help employees to identify the types of learning activity, methods and platforms for learning which are most effective for them, making use of unplanned opportunities. The standard includes giving opportunities for employees to apply their skills at work and encouraging them to take on new roles and responsibilities.

This standard is for all managers and leaders.

Support employees' learning and development

Performance criteria

You must be able to:

1. promote the benefits of learning to employees in your area of responsibility
2. encourage employees to seek feedback on their performance from colleagues who can provide objective, specific and valid feedback
3. give employees objective, specific and valid feedback on their work performance, discussing and agreeing how they can improve
4. agree the knowledge, skills and competence required to meet the demands of their current and potential future work roles with employees
5. provide opportunities and tools for employees to make an accurate assessment of their current levels of knowledge, skills and competence and of their potential
6. evaluate any additional, or higher levels of, knowledge, skills and competence employees need for their current work roles, potential future work roles and their personal aspirations
7. engage employees in identifying and obtaining information on the learning activities available to address identified learning needs
8. agree personal development plans which include learning activities to be undertaken, the learning objectives to be achieved, the required resources and timescales
9. identify and evaluate any learning difficulties or specific needs employees may have
10. provide opportunities and tools for employees to identify the types of learning they find most effective
11. provide learning and development activities that match their learning preferences
12. identify the range of learning methods, platforms and technologies to suit individual needs or preferences
13. encourage employees to focus on their prioritised learning needs when selecting learning activities and planning their development
14. arrange advice and support from learning and development specialists, when required
15. support employees in undertaking learning activities, making required resources available
16. remove any obstacles to learning, if required
17. provide opportunities for employees to apply their developing

Support employees' learning and development

competences in the workplace

18. identify and make use of unplanned learning opportunities
19. discuss progress towards the achievement of learning objectives
20. discuss readiness to take on new roles and responsibilities with employees
21. agree the support and supervision employees will require to take on new roles and responsibilities
22. appoint employees to roles and responsibilities that are compatible with their competences and potential
23. provide employees with the support and supervision they require
24. provide specific feedback to enable employees to improve their performance
25. discuss and agree revisions to personal development plans based on performance, learning activities undertaken and any wider changes
26. encourage people to take responsibility for their own learning and development, including practising and reflecting on what they have learned
27. evaluate learning and development activities to identify improvements for future support
28. follow the legal, organisational, codes of practice and policies relevant to supporting employees' learning and development

Support employees' learning and development

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. the benefits of learning for employees and the ways you can develop a culture where learning is valued and the willingness and efforts to learn are recognised
2. how to identify potential future roles and responsibilities for employees
3. how to provide employees with specific feedback designed to improve their performance
4. the tools available for assessing knowledge, skills and competence
5. how to analyse the gaps between current levels of knowledge, skills and competence and the levels required
6. how to develop learning and development plans based on a sound analysis of learning needs
7. why it is important for employees to have a written personal development plan and what it should contain (for example, identified learning needs, learning activities to be undertaken and the learning objectives to be achieved, timescales and required resources)
8. how to prioritise employees' learning needs, including taking account of organisational needs and priorities, and the personal and career development needs
9. the different types of learning activities, their advantages and disadvantages and the required resources (for example, time, fees, substitute staff)
10. the range of methods, platforms and technologies for learning and development
11. how and where to obtain information on different learning activities and how to match them to different individual learning preferences and learning content.
12. how to set learning objectives which are Specific, Measurable, Achievable, Realistic and Time-bound (SMART)
13. the types of support employees might need to undertake learning activities, the types of obstacles they may face and how these can be resolved
14. how to monitor and evaluate whether learning activities have achieved their intended learning objectives

Support employees' learning and development

- 15. the importance of regularly reviewing and updating personal development plans based on performance, learning activities undertaken and any wider changes
- 16. how to encourage employees to take responsibility for their own learning and development, including personal reflection on their performance
- 17. the sources of specialist expertise in relation to identifying and providing learning for employees

Industry and sector specific knowledge and understanding

- 18. the industry and sector requirements for the development or maintenance of knowledge, skills and competence and specific initiatives and arrangements
- 19. the legal, organisational, codes of practice and policies relevant to supporting employees' learning and professional development

Context specific knowledge and understanding

- 20. the employees in your team, their roles, responsibilities, competences and potential
- 21. the knowledge, skills and competence requirements for different roles within your area of responsibility the identified gaps in employees' knowledge, skills and competence
- 22. the tools used in your organisation to identify individual learning needs and preferences
- 23. the identified learning needs of employees and their personal development plans linked to performance management or appraisal
- 24. the learning activities and resources available in your organisation
- 25. the opportunities for employees' learning and career development in your organisation
- 26. the support and supervision available to employees within your organisation
- 27. your organisation's learning and personal and professional development policy and practices
- 28. the sources of internal and external specialist advice and support available to you

Support employees' learning and development

Skills

1. Coaching
2. Communicating
3. Decision-making
4. Delegating
5. Empathising
6. Empowering
7. Evaluating
8. Influencing
9. Inspiring
10. Involving others
11. Leading by example
12. Mentoring
13. Monitoring
14. Motivating
15. Persuading
16. Planning
17. Presenting information
18. Prioritising
19. Problem solving
20. Providing feedback
21. Questioning
22. Reviewing
23. Setting objectives
24. Thinking strategically
25. Valuing and supporting members of staff

Support employees' learning and development

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Originating Organisation	Instructus
Original URN	CFAM&LDC1, CFAM&LDC2
Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; support; learning & development

Overview

This standard is about coaching or mentoring employees, either in your own team or from another work group, to develop and maintain their performance. This standard also covers helping employees address problems affecting their performance. You understand the difference between mentoring and coaching. You help employees improve their performance by coaching them to identify their strengths and how they can use these most effectively. You support employees to analyse their performance and identify, develop, test and refine new skills and alternative behaviours as a coach. As a mentor, you provide information and advice to employees and facilitate their access to the resources they need to develop and progress.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. help employees identify their needs and expectations for coaching or mentoring
2. ensure that employees' coaching or mentoring needs and expectations are in accordance with your organisation's objectives
3. define your own expectations of the coaching or mentoring process
4. agree coaching or mentoring contracts covering the specific area(s) for performance development, the gaps between current and required performance, and employees' motivations
5. outline the support that employees can expect from you, and the commitment you expect from them
6. provide opportunities for employees to approach you, as a mentor or a coach, with problems affecting their performance
7. identify performance issues and bring these to the attention of the employees concerned
8. identify obstacles to performance and support employees to overcome them
9. agree revisions to planned actions when required
10. maintain confidential records of your discussions with employees about problems affecting their performance
11. agree coaching or mentoring arrangements with employees including what you will provide, timescales, the location, frequency and duration of meetings
12. agree points when progress will be reviewed and how this will be measured and assessed
13. explore the skills employees need to develop and the behaviours for change to meet the desired standard of performance during coaching conversations
14. explore obstacles which could hinder employees' progress and how to remove these obstacles
15. plan with employees how they can develop new skills and behaviours in a logical step-by-step sequence
16. provide opportunities for employees to develop new skills and experiment with alternative behaviours
17. encourage employees to identify and seize opportunities to apply their newly developed skills and behaviours to their work
18. explore with employees any risks involved in applying their newly developed skills and behaviours to their work

19. plan how to reduce any risks to levels acceptable to employees and the organisation
20. identify and facilitate employees' access to the resources, information and advice they require for their development
21. provide advice to employees based on your own knowledge and experience during mentoring conversations
22. encourage and empower employees to take responsibility for developing and maintaining their own self-awareness, performance and impact
23. encourage employees to reflect on their progress and clarify their thoughts and feelings about it
24. monitor employees' progress in a systematic way, keeping records as required by your organisation
25. provide specific feedback designed to improve employees' skills, reinforce effective behaviours and enhance their motivation to achieve the desired standard of performance
26. agree with employees when they have achieved the desired standard of performance, or when they no longer require coaching or mentoring
27. follow the legal, organisational, codes of practice and policies relevant to coaching or mentoring employees

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the differences between coaching or mentoring and the features and benefits of each approach
2. the range of coaching or mentoring models, tools and techniques available, and how to select and apply these
3. the skills effective coaches and mentors require, and how to apply these skills
4. how to establish a formal and informal coaching contract with employees and what the contract should cover, including ethical considerations
5. the importance in giving employees opportunities to discuss problems affecting their performance
6. the importance of identifying performance issues and bringing these to the attention of the employees concerned
7. the importance of discussing performance with employees
8. the different communication approaches that can be used to raise and discuss individual performance with employees
9. the coaching or mentoring communication techniques used to help employees identify the skills they need to develop and the behaviours they need to change
10. the types of obstacles that could hinder employees' progress and how to remove them
11. how to help employees prepare a plan to develop their skills and adapt their behaviours
12. how to help employees try out new skills and behaviours in safe environments
13. the importance of helping employees identify and seize opportunities to apply their newly developed skills and behaviours in their work
14. how to help employees assess and manage risks associated with new skills and behaviours
15. the importance of monitoring employees' progress in developing new skills and behaviours and how to do this
16. how to give employees specific feedback designed to improve their skills, reinforce effective behaviours and enhance their motivation
17. how to establish a mentoring contract with employees and what

Coach or mentor employees

the contract should cover

- 18. how to facilitate employees' access to the information, people and resources they require
- 19. the importance of employees reflecting on their progress and how to help them do this
- 20. the importance of recognising when employees have achieved their development objectives
- 21. how to empower employees to take responsibility for their own development

Industry and sector specific knowledge and understanding

- 22. the legal, organisational, codes of practice and policies relevant to coaching or mentoring employees

Context specific knowledge and understanding

- 23. the employees in your area of work, their roles, responsibilities, competences and potential
- 24. your organisation's objectives and culture for embedding coaching or mentoring practices through leadership and management
- 25. the types of coaching or mentoring contracts that your organisation requires
- 26. the documents and records that are used to support coaching or mentoring and how these are stored
- 27. the sources of information, resources and advice in your organisation that can support employees and you as a coach and mentor

Skills

1. Coaching
2. Communicating
3. Demonstrating
4. Empathising
5. Empowering
6. Evaluating
7. Influencing
8. Information management
9. Inspiring
10. Leading by example
11. Learning
12. Monitoring
13. Motivating
14. Networking
15. Obtaining feedback
16. Planning
17. Presenting information
18. Problem solving
19. Providing feedback
20. Questioning
21. Reflecting
22. Reviewing
23. Thinking systematically
24. Valuing and supporting members of staff

Coach or mentor employees

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Validity Current

Status Original

Originating Organisation Instructus

Original URN CFAM&LDC3, CFAM&LDC4

Relevant Occupations Managers and Senior Officials

Suite Management and Leadership

Keywords Management & leadership; coach, mentor employees

Overview

This standard is about developing and sustaining working relationships with colleagues within your own organisation, employees from other organisations that your organisation works with and other external stakeholders. You use relevant tools and technologies for managing different teams, including office-based, dispersed, remote or hybrid. You establish working relationships and respect the roles and responsibilities of colleagues and stakeholders, actively seeking to understand their perspectives. You identify and resolve conflicts, monitor working relationships and identify aspects that can be improved. You also create a climate of trust providing support to help move difficult situations forward. The standard includes consulting stakeholders, fulfilling agreements with them and resolving conflicts of interest. You monitor wider developments and gather feedback to evaluate the performance of working relationships.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. establish working relationships with relevant colleagues within your organisation
2. use relevant tools and technologies for managing different teams, including office-based, dispersed, remote or hybrid
3. recognise and respect the roles, responsibilities, interests and concerns of colleagues
4. create a climate of trust and mutual respect where you have no authority, or shared authority over your colleagues
5. explore difficult situations and issues from colleagues' perspectives and provide support to move things forward
6. provide colleagues with appropriate information to enable them to perform effectively
7. consult colleagues about key decisions and activities, taking account of their views
8. fulfil the agreements made with colleagues
9. advise colleagues of difficulties, or where it will be impossible to fulfil agreements
10. identify and resolve conflicts of interest and disagreements with colleagues in ways that minimise damage to work activities and to the individuals involved
11. monitor and review the effectiveness of working relationships with colleagues to identify areas for improvement
12. provide feedback to improve your colleagues performance
13. analyse the feedback you have received to improve your own performance
14. identify external stakeholders and the nature of their interest in the activities and performance of your organisation
15. establish working relationships with internal and external stakeholders
16. recognise and respect the roles, responsibilities, interests and concerns of stakeholders and, particularly in situations of matrix management, their managers requirements
17. evaluate difficult situations and issues from stakeholders' perspectives
18. provide support, where necessary, to move difficult situations forward
19. provide stakeholders with appropriate information to enable them to perform effectively

20. consult stakeholders about key decisions and activities and take account of their views, including their priorities, expectations and attitudes to potential risks
21. fulfil agreements made with internal and external stakeholders
22. advise stakeholders promptly of any difficulties or where it is not possible to fulfil the agreements made
23. identify and resolve conflicts of interest and disagreements with stakeholders in ways that minimise damage to work activities and to the stakeholders involved
24. monitor and review the effectiveness of working relationships with stakeholders to identify areas for improvement
25. gather feedback to improve your own and stakeholders' performance
26. monitor wider developments to identify issues of potential interest or concern to stakeholders in the future
27. identify new stakeholders to build working relationships with
28. follow the legal, organisational, codes of practice and policies relevant to developing and sustaining productive working relationships with colleagues and stakeholders

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. the importance to recognising and respecting the roles, responsibilities, interests and concerns of colleagues and stakeholders
2. the relevant tools and technologies for managing different teams, including office-based, dispersed, remote or hybrid
3. the importance of creating a climate of trust and mutual respect where you have no authority, or shared authority, over those you are working with
4. the importance of understanding difficult situations and issues from colleagues' perspectives and providing support, where necessary, to move things forward
5. how to identify and meet the information needs of colleagues and stakeholders
6. the information it is appropriate to provide to colleagues and stakeholders and the factors that need to be taken into consideration
7. how to consult with colleagues and stakeholders in relation to key decisions and activities
8. the importance of taking account, and being seen to take account, of the views of colleagues and stakeholders, particularly in relation to their priorities, expectations and attitudes to potential risks
9. why communication with colleagues and stakeholders on fulfilment of agreements or any problems affecting or preventing fulfilment is important
10. how to identify conflicts of interest with colleagues and stakeholders and the techniques that can be used to manage or remove them
11. how to identify disagreements with colleagues and stakeholders and the techniques for resolving them
12. the damage that conflicts of interest and disagreements with colleagues and stakeholders can cause to individuals and organisations
13. how to monitor and review the effectiveness of working relationships with colleagues and stakeholders
14. how to get and make effective use of feedback from colleagues and stakeholders
15. how to provide colleagues and stakeholders with feedback designed to improve their performance

- 16. the different types of stakeholder and key principles which underpin the 'stakeholder' concept
- 17. how to identify your organisation's stakeholders, including background information, the nature of their interest in your organisation and their expectations
- 18. how to recognise and take account of political issues when dealing with stakeholders
- 19. the importance of monitoring wider developments in relation to stakeholders to manage their expectations

Industry and sector specific knowledge and understanding

- 20. the standards of behaviour and performance in your industry and sector
- 21. the legal, organisational, codes of practice and policies relevant to developing and sustaining productive working relationships with colleagues and stakeholders

Context specific knowledge and understanding

- 22. the existing agreements with colleagues and stakeholders and their identified information needs
- 23. the mechanisms for consulting and communicating with colleagues and stakeholders on key decisions and activities
- 24. the power, influence and politics within your organisation and culture
- 25. the standards of behaviour and performance that are expected in your organisation
- 26. the mechanisms in place for monitoring and reviewing the effectiveness of working relationships with colleagues and stakeholders
- 27. the key stakeholders, their background and interests in the activities and performance of your organisation

Skills

1. Communicating
2. Empathising
3. Information management
4. Leading by example
5. Managing conflict
6. Networking
7. Obtaining feedback
8. Prioritising
9. Providing feedback
10. Stress management
11. Balancing competing needs and interests
12. Communicating
13. Consulting
14. Empathising
15. Information management
16. Involving colleagues
17. Leadership
18. Managing conflict
19. Monitoring
20. Networking
21. Obtaining feedback
22. Presenting information
23. Prioritising
24. Problem solving
25. Providing feedback
26. Reviewing
27. Valuing and supporting members of staff

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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LDD1, CFAM&LDD2
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; develop; sustain; productive working relationship
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Overview

This standard is about developing and sustaining collaborative relationships with other departments within your organisation and other organisations. You evaluate opportunities to collaborate, considering your organisation's objectives. You identify the benefits of collaboration and agree actions that will be completed. You also set up communication and reporting systems. The standard includes informing collaborators if you are unable to fulfil your organisation's commitments, solving difficult situations when working together and providing feedback to support performance.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. evaluate opportunities to work collaboratively with other departments to improve overall organisational efficiency and effectiveness
2. identify departments and organisations that share common or complementary objectives to determine the feasibility of collaboration
3. judge when to collaborate with other organisations, based on an evaluation of potential benefits, the compatibility of the organisations and your ability to mitigate any risks involved
4. create a climate of trust and mutual respect where you have no authority, or shared authority, over those you are working with
5. agree the aims and objectives of collaboration with other departments and organisations and the benefits for each collaborator
6. outline the resources each department and organisation will commit to collaborations
7. plan the actions each department and organisation will complete and when
8. define the expected outcomes and levels of service when collaborating
9. identify the risks involved in collaborations and how these will be managed
10. set up arrangements for communicating and reporting on progress
11. plan how and when you will review the effectiveness of your collaborations
12. complete actions within the agreed time and to the agreed quality
13. inform the other departments and organisations if you are unable to complete actions and the reasons for this
14. explore difficult situations and issues from other departmental and organisational perspectives and provide support to move things forward
15. provide reports, and receive reports from, the other departments and organisations according to arrangements agreed
16. provide feedback to the other departments and organisations to help them to perform effectively and reinforce their commitment and enthusiasm for collaboration
17. process information supplied by the other departments and

organisations in accordance with arrangements and relevant legislation

18. review the effectiveness of your collaboration at agreed times and the extent to which the aims and objectives have been achieved
19. evaluate the actions carried out by each department and organisation, any deviations from the actions agreed and reasons for these
20. identify any failures or mistakes, the reasons for these and ways of avoiding these failures or mistakes in the future
21. assess the collaboration costs and identify ways that costs may be reduced in the future
22. compare the benefits to each department and organisation, the value of these benefits and how mutual benefits may be increased in the future
23. agree the extent that expectations of each department and organisation have been met
24. recommend changes to make your collaboration more effective in the future
25. follow the legal, organisational, codes of practice and policies relevant to collaborative working

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. the importance of identifying and evaluating potential departments and organisations to collaborate with
2. the importance of basing your decision to collaborate on your evaluation of potential benefits, the compatibility of the departments, organisations and your ability to mitigate any risks involved, and how to do so
3. how to identify the potential costs (money, time and resources) of working together
4. how to identify and agree the benefits and costs of working together
5. how to identify the aims, values and working practices of other organisations and assess how compatible these are with your own organisation
6. how to develop service level agreements with other departments and what they should cover
7. how to assess and manage the risks involved in collaborative working
8. how to develop communication protocols with other departments and organisations
9. the importance of meeting your commitments and keeping employees informed if you are unable to do so
10. how to provide support to help collaborators meet their commitments
11. the importance of identifying and agreeing the actions each collaborator will take including when, and how to do so
12. the ways to plan how and when you will review collaborations and their effectiveness, and how to do so
13. the importance of reporting and receiving reports from collaborating organisations according to arrangements agreed, and how to do so
14. how to provide feedback to collaborating organisations in ways that help them to perform effectively and reinforce their commitment and enthusiasm for collaboration
15. how to process information supplied by collaborating departments and organisations in accordance with agreements and data protection

legislation

Industry and sector specific knowledge and understanding

- 16. the industry and sector requirements and legislation for collaboration with other organisations to achieve common or complementary objectives
- 17. the legal, organisational, codes of practice and policies relevant to collaborative working

Context specific knowledge and understanding

- 18. your organisation's structure, vision and strategic objectives, values and working practices
- 19. the nature of the relationship between departments, other organisations and your area of responsibility
- 20. the opportunities for collaboration with departments and other organisations
- 21. the range of digital technologies, platforms and tools for collaboration
- 22. the individual departments and other organisations that you need to collaborate, and their roles, responsibilities, competence and potential

Skills

1. Assessing
2. Communicating
3. Empathising
4. Evaluating
5. Information management
6. Involving employees
7. Leading by example
8. Managing conflict
9. Negotiating
10. Networking
11. Obtaining feedback
12. Presenting information
13. Prioritising
14. Problem solving
15. Providing feedback
16. Reporting
17. Reviewing
18. Risk management
19. Balancing competing needs and interests
20. Communicating
21. Decision-making
22. Evaluating
23. Information management
24. Negotiating
25. Networking
26. Planning
27. Presenting information
28. Reporting
29. Reviewing
30. Risk management
31. Setting objectives
32. Thinking strategically
33. Valuing and supporting members of staff

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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; develop; sustain; collaborative relationship; other departments

Manage conflicts in work environment

Overview

This standard is about managing conflicts in the broader work environment. The conflicts can be between different stakeholders, colleagues working at different levels, employees in different departments or other organisations. You communicate conflict management and resolution processes to the broader work environment, identifying differences in expectations to promote ways to manage situations. You take preventative action to avoid the negative impacts of conflicts and resolve conflicts when they emerge. You also act as a mediator and access support from specialists when required. This standard is for all managers and leaders.

Manage conflicts in work environment

Performance criteria*You must be able to:*

1. communicate the different types of conflict management and dispute resolution processes available to your organisation
2. identify differences in expectations and working methods of employees from different backgrounds
3. promote ways of managing differences that take account of different expectations
4. create a climate of trust and mutual respect
5. compare difficult situations from different employees' perspectives to understand the conflicts
6. identify any issues with organisational structures, systems or procedures that are likely to give rise to conflict
7. resolve any issues with organisational structures, systems or procedures creating conflict
8. identify potential conflicts across the wider organisation or with other organisations and take preventative action to avoid these
9. encourage the employees concerned to resolve their own problems and conflicts amongst themselves
10. take action to act as a third-party mediator to deal with conflicts when the employees concerned are not able to resolve the conflicts themselves
11. demonstrate respect for employees' emotions regarding the conflict
12. manage any negative emotions in yourself and the parties involved
13. investigate the causes of the conflict, giving all parties opportunities to present the facts and their perceptions about the conflict
14. agree how to resolve the conflict with all parties, without apportioning blame
15. accept help from colleagues or specialists, where necessary
16. comply with organisational and legal requirements when resolving conflicts
17. maintain complete, accurate and confidential records of conflicts and their outcomes, in line with organisational policy
18. follow the legal, organisational, codes of practice and policies relevant to managing conflict in the broader working environment

Manage conflicts in work environment

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the principles of communication, conflict management and dispute resolution and how to apply them
2. how to identify and address any issues with organisational structures, systems or procedures that may create conflict
3. how employees' backgrounds may create differences in expectations and how to manage these differences
4. the importance of identifying potential conflicts across the organisation to take preventative action to avoid these, and how to do so
5. the ways of dealing with conflicts when they arise, including what types of action should be taken and when
6. the process and principles of mediation to resolve work conflicts
7. the different conflict resolution techniques and how to apply them in different situations
8. the importance of acknowledging and showing respect for employees' emotions regarding the conflict and how to manage any negative emotions in yourself and employees
9. how to identify the causes of the conflict, remain impartial, and give all parties opportunities to present the facts and their perceptions about the conflict
10. the importance of identifying and agreeing with team members how to resolve the conflict, without apportioning blame, and how to do so
11. when and how to seek help from colleagues or specialists
12. how and why conflict happens in the broader work environment, between different stakeholders, different levels, different departments or organisations

Industry and sector specific knowledge and understanding

13. the industry and sector requirements and systems for managing conflicts
14. the legal, organisational, codes of practice and policies relevant to managing conflict in the broader working environment

Context specific knowledge and understanding

15. your organisation's culture, rank and role hierarchies, and how work roles interface, complement and support each other

Manage conflicts in work environment

16. the organisational structures, systems and procedures that are likely to create conflict
17. the sources of specialist or third-party support available to you to manage conflicts
18. the organisational and legal requirements for resolving conflicts and maintaining records and their outcomes

Manage conflicts in work environment

Skills

1. Communicating
2. Empathising
3. Evaluating
4. Information management
5. Managing conflict
6. Monitoring
7. Obtaining feedback
8. Problem solving
9. Providing feedback
10. Questioning
11. Reviewing
12. Risk management
13. Stress management
14. Valuing and supporting members of staff

Manage conflicts in work environment

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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; manage conflict; broader work environment

Lead meetings to achieve objectives

Overview

This standard is about leading meetings to achieve objectives. The meetings may be to solve problems, take decisions, consult with colleagues or to exchange information and knowledge. You determine the purpose of meetings, prepare to lead them and invite participants to attend. You confirm why meetings are important and brief individual participants to contribute when required. To conduct the meetings, you use the relevant technologies or digital tools for face-to-face or remote meetings. During meetings, you encourage everyone to participate and re-focus attention when required. You are also flexible in changing agenda items and timings to ensure that objectives are met. The standard includes summarising discussions and allocating actions to participants that are circulated afterwards.

This standard is for all managers and leaders.

Lead meetings to achieve objectives

Performance criteria

You must be able to:

1. establish the purpose and objectives of meetings
2. prepare to lead meetings and identify who needs to participate
3. use the relevant tools and technologies for conducting the meeting face-to-face or remotely
4. invite participants, giving them sufficient notice to enable them to attend
5. state the importance of the meeting, the role participants will be expected to play
6. circulate information in advance to enable participants to review and prepare
7. consult with relevant colleagues and prepare to represent their interests and opinions
8. brief participants on the content and purpose of meetings and their roles, when required
9. set time for meetings to begin and end and allocate time for each agenda item
10. check that all participants understand why they are present and what is expected of them
11. clarify specific objectives at the beginning of each agenda item
12. present information at meetings to develop the understanding of other participants
13. present your opinions and the interests of those you are representing persuasively, providing evidence to support your case, where required
14. encourage all participants to make contributions from their perspectives, whilst acknowledging and building on their contributions
15. re-focus attention on the objectives of the meetings when unhelpful comments and digressions occur
16. identify any issues emerging from discussions which impact on your area of responsibility
17. propose and evaluate possible solutions which meet the needs of your area of responsibility, other teams and your organisation
18. acknowledge and constructively discuss information and opinions provided by your colleagues
19. clarify decisions taken on the various agenda items, where necessary
20. manage time flexibly, giving more time to agenda items, if

Lead meetings to achieve objectives

- necessary, whilst ensuring key objectives are met
21. inform participants of changes in meeting agendas when these happen
 22. summarise discussions at key points during meetings
 23. allocate action points to participants at the end of each agenda item
 24. take decisions within the meeting's authority, remit or terms of reference
 25. observe any formal procedures or standing orders that apply to the meeting in accordance with your organisation's requirements
 26. check that decisions and action points are recorded and communicated to participants
 27. evaluate whether the purpose and objectives of the meetings have been achieved
 28. identify how future meetings could be improved
 29. follow the legal, organisational, codes of practice and policies relevant to your role when leading meetings to achieve objectives

Lead meetings to achieve objectives

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. the importance of briefing yourself on the purpose, objectives and agenda of the meeting
2. how to identify relevant information for meetings and clarify your opinions on the various agenda items
3. the importance of consulting relevant colleagues in your area of responsibility, and how to develop your understanding to be able to represent their interests and opinions
4. the importance of circulating information in advance and briefing participants individually on the content and purpose of the meeting and their roles
5. how to inform participants of the role they will be expected to play, the preparation they need to do and the objectives of the meeting
6. the time for meetings to begin and end and duration for each agenda item
7. the importance of confirming a meeting is the best way to achieve objectives
8. the importance of preparing how you will lead the meeting and how to do so
9. how to identify who needs to participate in the meeting and the inputs you require from them
10. the importance of inviting participants, giving them sufficient notice to enable them to attend and contribute to the agenda
11. how to identify the information that participants require in advance of meetings
12. the importance of presenting relevant information and opinions during the meetings and how to do so
13. the ways to identify and articulate any issues and problems emerging from discussions, and how to contribute to resolving them
14. how to present your opinions and the interests of those you are representing persuasively and why this is important
15. the importance of stating the purpose of the meeting at the start and checking that all participants understand why they are present and what is expected of them
16. how to clarify specific objectives at the beginning of each agenda item and the impact this has

Lead meetings to achieve objectives

17. the ways to encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants
18. how to discourage unhelpful comments and digressions, and refocus attention on the objectives of meetings
19. how to manage time flexibly, giving more time to agenda items, if necessary, whilst ensuring the key objectives are met and participants are kept informed of changes in agendas
20. the importance of summarising the discussion at key points and allocating action points to participants at the end of each agenda item and how to do so
21. how to take decisions within a meeting's authority, remit or terms of reference and how to refer decisions to colleagues when required
22. the importance of checking that decisions and action points are accurately recorded and promptly communicated to participants
23. how to evaluate whether the purpose and objectives of meetings have been achieved and how future meetings could be made more effective

Industry and sector specific knowledge and understanding

24. the industry and sector requirements for leading meetings
25. the legal, organisational, codes of practice and policies relevant to your role when leading meetings to achieve objectives

Context specific knowledge and understanding

26. the colleagues who need to participate in meetings and the roles they will be expected to play
27. the tools and technologies for conducting the meeting face-to-face or remotely
28. the types and sources of information required in advance of meetings
29. the meeting's authority, remit or terms of reference and any formal procedures or standing orders that apply to the meeting

Lead meetings to achieve objectives

Skills

1. Building consensus
2. Communicating
3. Consulting
4. Decision-making
5. Information management
6. Involving colleagues
7. Leadership
8. Obtaining feedback
9. Planning
10. Presenting information
11. Providing feedback
12. Setting objectives
13. Time management

Lead meetings to achieve objectives

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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; lead meeting; achieve objectives

Identify and justify requirements for financial resources

Overview

This standard is about identifying and justifying the financial resources required for achieving organisational objectives. You identify financial resource requirements, justifying them in accordance with the objectives set. You estimate costs of activities and overheads for the method you have selected. You prepare a business case including methods, timescale, costs, risks and evaluation arrangements and seek approval from decision-makers. The standard also includes providing alternative options when required and seek feedback on your presentation of the business case to improve future proposals. This standard is for all managers and leaders.

Identify and justify requirements for financial resources

Performance criteria

You must be able to:

1. confirm the organisational objectives to be achieved
2. identify and justify requirements for financial resources by engaging with stakeholders
3. identify methods of achieving objectives
4. evaluate the effectiveness and efficiency of methods to select the optimal method
5. estimate the costs of the activities and overheads required to achieve objectives by the optimal method
6. prepare the business case for your requirements for financial resources, specifying objectives and the benefits of achieving these objectives
7. outline the proposed method, timescales for activities and costs involved in your business case
8. perform cost benefit analysis
9. specify the assumptions made, the risks and how these will be managed in your business case
10. outline evaluation arrangements
11. provide any alternative options considered but rejected as sub-optimal to stakeholders
12. prepare alternative options for achieving objectives, in case your budget requirements are not approved
13. present your business case to budget decision-makers, providing any further information or rationale required
14. defend your business case, engaging the support of stakeholders and decision-makers
15. seek approval for alternative options when your original business case for budget requirements is not accepted
16. obtain feedback on your presentation of the business case from decision-makers to help improve future proposals
17. communicate the decision on your budget requirements to stakeholders, explaining the reasons for any changes or alternative options adopted
18. follow the legal, organisational, codes of practice and policies relevant to your role when identifying and justify requirements for financial resources

Identify and justify requirements for financial resources

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage stakeholders in identifying and justifying requirements for financial resources
2. the financial resource planning principles and methods available and how to apply them
3. how to identify and select optimal methods for achieving objectives
4. how to calculate fixed and variable costs of activities
5. the importance of cost-benefit analysis techniques and how to use them
6. the different decision-making techniques available and how to select and apply them
7. what a business case should cover and how to develop convincing arguments for what you are proposing
8. how to present and argue a business case
9. the importance of identifying assumptions made
10. how to identify and manage risks
11. the different negotiation techniques that can be used and how to apply them
12. the importance of developing alternative solutions as fallback positions
13. the importance of obtaining feedback on your presentation of the business case and how to use this feedback to improve future proposals

Industry and sector specific knowledge and understanding

14. the legal, organisational, codes of practice and policies relevant to your role when identifying and justify requirements for financial resources

Context specific knowledge and understanding

15. your organisation's stakeholders and their interests and strategic objectives
16. the objectives you are responsible for achieving
17. the roles and employees with budgetary responsibility in your organisation

Identify and justify requirements for financial resources

Skills

1. Acting assertively
2. Analysing
3. Communicating
4. Decision-making
5. Evaluating
6. Involving colleagues
7. Negotiating
8. Obtaining feedback
9. Persuading
10. Presenting information
11. Problem solving
12. Providing feedback
13. Reflecting
14. Reporting
15. Risk management

Identify and justify requirements for financial resources

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; budgets
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Manage financial resources

Overview

This standard is about managing financial resources to achieve the objectives for your organisation or your area of responsibility. You manage finances to achieve organisational objectives by engaging with stakeholders. You identify the finances required and evaluate the costs, benefits and risks, accessing specialist advice when required. The standard also includes negotiating budgets, developing master budget plans and delegating budget responsibilities to colleagues. You obtain finance from external providers for projects or programmes of work. You also establish systems to monitor, report and evaluate budget performance, taking corrective actions when required.

This standard is for all managers and leaders.

Manage financial resources

Performance criteria

You must be able to:

1. confirm your financial responsibilities, including the limits of your authority, with colleagues you report to
2. engage key stakeholders in managing finance to achieve objectives for your organisation or area of responsibility
3. evaluate financial information, your organisation's objectives and plans to identify priorities, potential problems and risks
4. identify the finance required to achieve your organisation's objectives and plans
5. access specialist financial expertise, where required
6. evaluate the costs, benefits and risks of different types of finance
7. select the types of finance which meet the needs of your organisation, taking account of levels of acceptable risk and views of stakeholders
8. identify and evaluate potential providers of finance
9. submit clear, evidenced and convincing proposals, bids or applications to potential providers of finance
10. request updates on progress to secure finance from providers
11. make formal agreements with providers of finance, specifying amounts, timing, costs and repayment schedules
12. discuss and negotiate delegated budgets with colleagues and agree provisional budgets
13. develop a master budget for your organisation or area and submit it for approval by budget decision-makers, clearly specifying assumptions made, risks involved and how these will be managed
14. discuss and negotiate the proposed master budget with decision-makers
15. communicate the final budget to colleagues in your area or senior managers
16. delegate responsibility for budgets for clearly defined activities to colleagues, providing ongoing support and resources as required
17. identify any shortfall in the level of finance obtained and take appropriate action
18. put contingency plans in place to deal with any problems in finance being made available and any changes to the level of finance required
19. establish systems to monitor and evaluate performance against delegated budgets and the master budget and put contingency plans in place

Manage financial resources

20. identify the causes of any significant variances between proposed versus actual budget
21. take corrective action, obtaining agreement from decision-makers, if required
22. propose revisions to the master budget, if necessary, in response to variances and/or significant or unforeseen developments
23. agree master budget revisions with decision-makers
24. report on the financial performance of your area to decision-makers
25. link operational targets with financial results
26. monitor the financial agreements with providers, identifying and making changes where necessary
27. advise relevant employees promptly if you have identified evidence of any potentially fraudulent activities
28. review the financial performance of your organisation or area and identify improvements to be implemented in the future
29. follow the legal, organisational, codes of practice and policies relevant to managing financial resources and obtaining finance

Manage financial resources

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of agreeing your financial responsibilities, including the limits of your authority, with those to whom you report
2. where to get and how to evaluate the available financial information to be able to prepare a realistic master budget
3. the importance of taking account of the objectives and associated plans of your area in developing and operating the master budget
4. the importance of consulting with colleagues in identifying priorities, potential problems and risks to prepare the budget for your area
5. how to discuss, negotiate and confirm budgets with colleagues in your area and with employees who control the finance and the key factors that should be covered
6. where to obtain and how to evaluate information to identify an organisation's requirement for finance
7. how to evaluate the costs, benefits and risks of different types and providers of finance, including how to work out the full cost of obtaining finance from providers
8. the criteria for selecting types and providers of finance to match organisational needs and the views of stakeholders
9. the importance of risk in obtaining finance and ways in which the level of risk can be identified and managed
10. the importance of submitting clear proposals or bids or applications to potential providers of finance and allowing sufficient time for their submission and consideration
11. the type of formal agreements that should be put in place with providers of finance, what they should cover, and how to monitor them
12. why it is necessary to put contingency plans in place in relation to obtaining finance and the type of contingencies that might occur
13. the main causes of variances, how to identify them and the different types of corrective action for addressing identified variances
14. the importance of agreeing revisions to the budget and communicating the changes
15. the importance of providing regular information on the financial performance of your area to colleagues and what they might want to know

Industry and sector specific knowledge and understanding

- 16. the types and providers of finance that tend to be used in your industry or sector, and why they are preferred
- 17. the factors, trends and developments that are likely to affect financial management in your industry and sector
- 18. the legal, organisational, codes of practice and policies relevant to managing financial resources and obtaining finance

Context specific knowledge and understanding

- 19. the vision, objectives and plans of your organisation, including those which require finance
- 20. the current types and providers of finance used by your organisation and other potential providers of finance and their associated costs, benefits and risks
- 21. the needs of your organisation for securing finance, including the organisation's attitude to risk and stakeholder views regarding the financing of projects and activities
- 22. the colleagues and key stakeholders who should be consulted on proposals and recommendations for obtaining finance
- 23. the specialist financial expertise currently used by your organisation and other potential sources of expertise
- 24. the systems in place for monitoring the effectiveness of the agreements for finance and identifying changes to agreements for future improvements
- 25. the financial information available in your organisation, the budgeting periods used, and the agreed master budget for your area, including delegated budgets
- 26. your financial responsibilities, including the limits of your authority and colleagues with budgetary responsibility in your organisation
- 27. your organisation's procedures for the preparation and approval of budgets, and the systems established for managing, reporting and evaluating performance against budgets
- 28. what to do and whom to contact if you suspect financial fraud has been committed

Manage financial resources

Skills

1. Communicating
2. Contingency planning
3. Decision-making
4. Evaluating
5. Forecasting
6. Influencing
7. Information management
8. Involving employees
9. Leadership
10. Monitoring
11. Negotiating
12. Persuading
13. Planning
14. Presenting information
15. Prioritising
16. Problem solving
17. Questioning
18. Reviewing
19. Risk management
20. Thinking strategically

Manage financial resources

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; funds; external sources
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Manage budgets

Overview

This standard is about managing budgets for your area of responsibility, specific projects or activities. You gather information and evaluate it to plan budgets, engaging colleagues and stakeholders in the process. You produce budget proposals, submit them to decision-makers and agree final budgets. The standard also includes monitoring budgetary performance, taking corrective actions when required. You propose revisions and provide reports to decision-makers, including identifying potential fraud if necessary.

This standard is for all managers and leaders.

Manage budgets

Performance criteria

You must be able to:

1. engage colleagues and stakeholders to provide information related to budget planning and management
2. gather information to plan budgets for your area of responsibility, activities or projects
3. identify organisational key performance indicators (KPIs)
4. evaluate information to prepare forecasts for your area of responsibility, activities or projects
5. produce budget proposals based on your evaluation of the information gathered
6. submit your proposed budgets for decision-makers approval clearly specifying assumptions made, risks involved and how these will be managed
7. negotiate the proposed budgets with decision-makers to agree final budgets
8. use the agreed budgets to monitor and control performance for your area of responsibility, activities or projects
9. identify the causes of any significant variances between what was budgeted and what happened
10. take corrective action when required to manage budgets
11. obtain agreement for corrective actions from decision-makers, if required
12. track the budgets in response to variances, significant or unforeseen developments and propose revisions to them
13. discuss and agree revisions with decision-makers
14. provide reports on performance against the budgets to decision-makers
15. identify and report evidence of potentially fraudulent activities in line with legal and organisational procedures, if required
16. gather information from implementation of the budget to assist in the preparation of future budgets
17. evaluate your budget management to identify and recommend improvements
18. follow the legal, organisational, codes of practice and policies relevant to managing budgets

Manage budgets

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the purposes of budgetary systems and how to engage colleagues and stakeholders in managing budgets
2. where to get and how to evaluate the available information to be able to prepare a realistic budget
3. your organisation's key performance indicators (KPIs)
4. how to discuss, negotiate and confirm a budget with those with budgetary responsibility and the key factors that should be covered
5. how to forecast the budgets
6. how to use a budget to actively monitor and control performance for a defined area or activity of work
7. the main causes of budget variances, how to identify them and the different types of corrective action which could be taken to address identified variances
8. how to track the budgets against the performance criteria
9. the importance of agreeing revisions to the budget and communicating the changes
10. the importance of providing regular information on performance against the budget to colleagues
11. the types of fraudulent activities that can occur, how to identify them and gather supporting evidence
12. the importance of using the implementation of the budget to identify information and lessons for the preparation of future budgets

Industry and sector specific knowledge and understanding

13. the factors, trends and developments that are likely to affect the setting of budgets in your industry and sector
14. the legal, organisational, codes of practice and policies relevant to managing budgets

Context specific knowledge and understanding

15. the vision, objectives and operational plans and budgets for your area of responsibility
16. the budgeting periods used in your organisation
17. your organisational guidelines and procedures for the preparation and approval of budgets, monitoring and reporting of performance against budgets, and revising budgets
18. the agreed budgets within your area of responsibility, how they can

Manage budgets

- be used, how much you can change them within the limits of your authority, and how to obtain agreement for changes beyond your limits
19. who needs information in your organisation about performance against your budget, what information they need, when they need it and in what format
20. what to do and who to contact if you suspect fraud has been committed

Manage budgets

Skills

1. Acting assertively
2. Communicating
3. Consulting
4. Contingency planning
5. Decision-making
6. Evaluating
7. Information management
8. Learning
9. Monitoring
10. Negotiating
11. Presenting information
12. Problem solving
13. Reporting

Manage budgets

Developed by	Instructus
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; manage budgets
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Manage physical resources

Overview

This standard is about managing the physical resources required to carry out planned activities in your area of responsibility. Physical resources may include equipment, materials, premises, services and energy supplies. You identify the physical resources required by engaging with colleagues and evaluating historical patterns of resource use and trends. You specify resource requirements and produce a business case to secure them. You adapt plans when resources cannot be obtained, agreeing adjustments with colleagues. The standard includes negotiating with suppliers to obtain resources and agreeing approaches for using shared resources with other teams. You also monitor resources to minimise adverse environmental impact, checking that they are used safely.

This standard is for all managers and leaders.

Manage physical resources

Performance criteria

You must be able to:

1. engage resource users to identify and obtain the physical resources required
2. evaluate past patterns of resource use and trends
3. identify developments likely to affect future demand for resources
4. prepare specifications for the resources required
5. identify the range and quantity of resources required for the planned activities in your area of responsibility, including contingencies
6. identify sustainable resources and ensure their effectiveness and efficiency to meet specified needs
7. produce a business case for the resources required, showing the costs and expected benefits
8. agree adjustments to your planned activities, where the required resources cannot be obtained in full
9. negotiate with suppliers to ensure they deliver resources of the required quality on time
10. agree the use of shared resources with other teams, considering the needs of the different parties and the objectives of your organisation
11. engage resource users to plan how they can be used most efficiently
12. plan to use resources in ways that are effective, efficient and minimise any adverse impact on the environment
13. maintain the security of resources and monitor that they are used safely
14. ensure that resources no longer required are disposed of with minimal adverse environmental impact
15. monitor the quality of resources and patterns of resource use in line with your organisation's requirements
16. identify and deal with any significant variances between actual and planned resource use
17. follow the legal, organisational, codes of practice and policies relevant to managing physical resources

Manage physical resources

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of engaging with resource users (equipment, materials, premises, services and energy supplies), 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 cost-benefit analyses and write business cases
5. how to develop activity plans and adjust the plans if required resources cannot be obtained to support them
6. how to negotiate with suppliers to ensure they deliver resources of the required quality on time
7. how to negotiate the use of shared resources with colleagues to optimise resource use for all concerned
8. the potential impact of resource use on the environment and actions you can take to minimise any adverse impact
9. the risks associated with different physical 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, and how to do so
11. the types of corrective actions (e.g. 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

Industry and sector specific knowledge and understanding

12. the industry and sector requirements for managing physical resources
13. the legal, organisational, codes of practice and policies relevant to managing physical resources

Context specific knowledge and understanding

14. the past patterns of resource use in your area of responsibility, how to access this information and analyse it to plan activities
15. the trends and developments that affect future demand for resources in your area of responsibility and how to evaluate the likely impact of these
16. the planned activities in your area of activity and possible

Manage physical resources

contingencies

17. the actual and potential suppliers of the resources you need to carry out planned activities in your area of responsibility

Manage physical resources

Skills

1. Analysing
2. Communicating
3. Contingency planning
4. Decision-making
5. Evaluating
6. Forecasting
7. Influencing
8. Information management
9. Involving employees
10. Monitoring
11. Negotiating
12. Persuading
13. Planning
14. Presenting information
15. Prioritising
16. Problem solving
17. Reviewing
18. Risk management

Manage physical resources

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; physical resources
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Manage the environmental and social impacts of your work

Overview

This standard is about managing work activities and resources in your area of responsibility to minimise the negative impact, and maximise the positive effect they may have on the environment and society. You contribute to environmental and social impact improvements by working with your team and stakeholders, organising sustainable resource use and ensuring compliance with environmental and social impact policies. You report environmental risks beyond your control and obtain specialist advice when required. You also implement changes to activities to reduce negative and increase positive impacts of your organisation's work on the environment and demonstrate corporate social responsibility.

This standard is for all managers and leaders.

Manage the environmental and social impacts of your work

Performance criteria

You must be able to:

1. identify opportunities for improving the environmental and social impacts by engaging your team and stakeholders
2. contribute to improving the environmental and social impacts by working with your team and stakeholders
3. organise work activities and safe and sustainable use of resources
4. assess work activities to ensure they comply with legal requirements, environmental and social impact policies
5. agree actions to minimise negative and maximise positive impacts on the environment and society
6. identify the environmental and social impacts of work activities
7. identify the environmental and social impacts of the use of resources
8. report any identified risks to the environment which you do not have the ability to control
9. identify and implement changes to work activities and the use of resources that will reduce negative and increase positive impacts on the environment and society
10. communicate the environmental and social benefits resulting from changes to work activities and the use of resources
11. obtain specialist advice, where necessary, to help you identify and manage the environmental and social impacts of your work activities and use of resources
12. follow the legal, organisational, codes of practice and policies relevant to managing the environmental and social impacts of your work

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to organise work activities and the use of resources in your area of responsibility so that they are efficient, effective and sustainable
2. the importance of organising work activities and the use of resources so that they minimise their negative and maximise their positive environmental and social impacts, and how to do this in your area of responsibility
3. how to engage employees and other stakeholders in managing the environmental and social impacts of work
4. how to identify and implement changes to work activities and the use of resources that will reduce their negative and increase their positive environmental and social impacts

Industry and sector specific knowledge and understanding

5. the industry and sector requirements for managing environmental performance
6. the industry and sector requirements for corporate social responsibility
7. the legal, organisational, codes of practice and policies relevant to managing the environmental and social impacts of your work

Context specific knowledge and understanding

8. your organisation's environmental and corporate social responsibility policies and how to comply with them
9. the types of risks to the environment that you do not have the ability to control within your role and why it is important to identify risks
10. the employees in your area of responsibility who can contribute to, and identify opportunities for, improving the environmental and social impacts of work
11. the range of environmental and social specialists that exists inside and/or outside your organisation
12. your role, responsibilities and limits of your authority in relation to managing the environmental and social impacts of your work

Manage the environmental and social impacts of your work

Skills

1. Assessing
2. Communicating
3. Consulting
4. Decision-making
5. Evaluating
6. Involving employees
7. Monitoring
8. Planning
9. Presenting information
10. Reporting
11. Risk management

Manage the environmental and social impacts of your work

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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; environment; social impact of work

Optimise the use of technologies

Overview

This standard is about optimising the use of technologies. You engage with colleagues to develop approaches for using technologies, sourcing and using specialist when required. You review strategies for using technologies and monitoring their performance. You also identify planned technology changes including using them for new purposes and introducing new technologies. You benchmark to identify good practice and ensure your technologies are aligned to organisational strategy. The standard also includes communicating the strategy, checking compatibility, resolving technology problems and contingency planning. You support colleagues to use technologies, monitoring and maintaining systems during strategy implementation and reporting on performance.

This standard is for all managers and leaders.

Optimise the use of technologies

Performance criteria

You must be able to:

1. develop effective approaches to the use of technologies by engaging relevant colleagues
2. identify and secure sources of internal and external specialist support
3. identify the current approaches to the use of technologies within your organisation or area of responsibility
4. identify any plans to discard or introduce technologies or to use existing technologies for different purposes within your organisation or work area
5. carry out benchmarking to identify good practice in relation to the use of technologies
6. identify lessons learnt and apply these to your organisation
7. identify opportunities for introducing new technologies, adapting existing technologies or using existing technologies for different purposes
8. develop your strategy for using technologies and monitoring performance, using specialist expertise when required
9. implement your strategy for using technologies and monitoring performance, using specialist expertise when required
10. review your strategy for using technologies and monitoring their performance
11. ensure that your strategy for using technologies is aligned to the overall vision, values, objectives and plans of your organisation
12. communicate the technology strategy to colleagues and key stakeholders
13. check that new technologies are compatible with current technologies
14. monitor the introduction of any technology, or adaptation of existing technology
15. resolve technological problems within agreed organisational service levels
16. provide resources and support to enable colleagues to make effective use of technologies
17. ensure that contingency plans are in place in case technology fails
18. maintain systems to monitor implementation of technologies
19. report on technology performance for your organisation or area of responsibility

20. follow the legal, organisational, codes of practice and policies relevant to optimising the effective use of technology

Optimise the use of technologies

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the different types of technologies and the main factors to consider when assessing the use or introduction of new technologies, including the full costs and benefits
2. the importance of consulting with colleagues and relevant parties in relation to technologies
3. what an effective organisational strategy for using technologies should cover
4. the importance of contingency planning in relation to the ongoing use or introduction of technologies and how to do this
5. the different techniques and methods for communicating your organisation's strategy for using technologies
6. how to benchmark your organisation's use of strategy against other organisations
7. how to check the compatibility of new technologies with existing technologies
8. how to establish systems for reviewing the implementation of the strategy and identifying areas for improvement
9. the types of resources and support needed to enable colleagues to make the best use of technologies

Industry and sector specific knowledge and understanding

10. the trends and types of technology that are available to your industry and sector and their main features, benefits and drawbacks
11. the financial or other incentives or support that may be available for investing in technology in your industry and sector
12. the legal, organisational, codes of practice and policies relevant to optimising the effective use of technology

Context specific knowledge and understanding

13. the role of technologies in your organisation's culture and the current approaches to use
14. the plans to discard or introduce technologies, or use existing technologies for different purposes and who needs to be consulted across the organisation
15. the other parties with an interest in your organisation's use of technologies
16. the vision, values, objectives and plans of your organisation and

Optimise the use of technologies

how the technology strategy aligns

17. the systems in place for effective monitoring and reporting on the use of technologies, including contingency plans
18. the specialists who can advise your organisation on using technologies
19. what technologies have already been used in your organisation and what the outcomes were

Optimise the use of technologies

Skills

1. Benchmarking
2. Communicating
3. Consulting
4. Contingency planning
5. Information management
6. Innovating
7. Involving colleagues
8. Lead by example
9. Leadership
10. Monitoring
11. Networking
12. Planning
13. Problem solving
14. Questioning
15. Reporting
16. Reviewing
17. Thinking strategically
18. Thinking systematically

Optimise the use of technologies

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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; technologies; personal objectives

Overview

This standard is about managing information, knowledge and communication systems for your organisation or your area of responsibility. You develop systems by engaging with colleagues and stakeholders, considering current and future needs. You evaluate the capability and capacity of your organisation's information, knowledge and communication systems to identify any changes required. You also evaluate the technologies and suppliers available to meet organisational needs, including relevant levels of security. The standard includes implementing protocols for using systems and ensuring that users are trained and supported. You facilitate the creation, maintenance and sharing of organisational knowledge specifying standards and processes. You consider the organisational culture, values, work practices and behaviours that hinder effective knowledge management and implement strategies to overcome these. You encourage senior managers to role-model good practices and promote knowledge management.

This standard is for all managers and leaders.

Manage information, knowledge and communication systems

Performance criteria

You must be able to:

1. engage colleagues and stakeholders in developing, implementing and maintaining information, knowledge management and communication systems
2. establish the current and likely future information, knowledge and communication needs of employees within your organisation or area of responsibility and other stakeholders
3. establish the levels of security required for information, knowledge and communication systems
4. evaluate the capability and capacity of existing information, knowledge and communication systems to meet current needs
5. evaluate the capability and capacity of existing information, knowledge and communication systems to meet likely future needs, and identify changes and enhancements
6. evaluate the capability of technologies and suppliers to meet current and likely future information, knowledge and communication needs
7. select technologies and suppliers capable of meeting current and likely future information, knowledge and communication needs to the level of security required within resource constraints
8. implement any new or modified protocols to allow information, knowledge and communication systems to be used effectively and securely
9. evaluate the training and on-going support required to enable employees to use information, knowledge and communication systems effectively, efficiently and securely
10. develop and implement plans to introduce changes and enhancements to information, knowledge and communication systems that minimise adverse impacts on business activities
11. enable employees to benefit from the changes and enhancements
12. provide user training and on-going support required
13. ensure maintenance and updating of information, knowledge and communication systems is carried out as required by your organisation
14. monitor the security of systems and their effectiveness in meeting employees' information, knowledge and communication needs, and take effective action to address any problems
15. identify where key knowledge is created, developed, shared and transferred and how it adds value to your organisation or area of

- responsibility
16. define and gain support for strategies to facilitate the creation, maintenance and sharing of organisational knowledge
 17. specify standards and processes that support knowledge creation, development, sharing and capture to ensure that valuable knowledge is recorded
 18. provide systems and tools to support knowledge management and sharing
 19. ensure employees have the necessary guidance and competence to use systems and tools effectively
 20. identify where organisational culture, values, work practices and behaviours hinder effective knowledge management and sharing, and any changes required
 21. implement changes in organisational culture, values, work practices and behaviours to enable effective knowledge management and sharing
 22. encourage senior managers and key influencers within your organisation to act as role models in using knowledge management standards, systems, tools and processes
 23. implement effective systems and procedures to protect intellectual property from unauthorised use
 24. identify and implement processes that promote effective knowledge management and sharing and communicate the benefits of doing so
 25. monitor and review progress in embedding a culture of knowledge management and sharing in your organisation and plan any essential changes
 26. evaluate and record the value of knowledge management and sharing to the organisation
 27. follow the legal, organisational, codes of practice and policies relevant to managing information, knowledge and communication systems

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage colleagues and stakeholders in managing information, sharing knowledge and communication systems
2. how to gather and analyse data about employees' information, knowledge and communication needs
3. the principles, methods, tools and techniques for keeping information, knowledge and communication secure and how to establish appropriate security levels and approaches
4. how to evaluate current information, knowledge and communication systems and their capability and capacity to meet future needs
5. the range of information, knowledge and communication technologies available, and how to match their features and benefits to your needs
6. the suppliers of information, knowledge and communication technologies and their capabilities
7. how to develop protocols to allow information, knowledge and communication systems to be used effectively and securely
8. the training and support in the use of information, knowledge and communication systems that employees require
9. the change management principles, methods, tools and techniques that help support implementation of information, knowledge and communication systems
10. how to establish the requirements for system maintenance and updating
11. the existing and emerging knowledge management theories, concepts, strategies, principles, techniques and good practice
12. the systems and tools available to support knowledge management and sharing and how to select appropriate ones
13. how to specify standards and processes to support knowledge management and sharing
14. the systems and procedures to protect intellectual property from unauthorised use and how to identify and develop appropriate ones
15. how to evaluate the value of knowledge and knowledge management to the organisation

and gain support for organisational strategies

16. how to monitor the effectiveness of information, knowledge sharing and communication systems to identify and take action to address problems

Industry and sector specific knowledge and understanding

17. the industry standards, requirements and benchmarks for information management, knowledge sharing and communication systems

18. the legal, organisational, codes of practice and policies relevant to managing information, knowledge and communication systems

Context specific knowledge and understanding

19. the individuals and groups in your organisation and their information, knowledge and communication needs

20. your organisation's current information, knowledge and communication systems

21. the levels of security of information, knowledge and communication required by your organisation

22. the levels of security appropriate for different users of your organisation's information, knowledge and communication systems

23. your organisation's business activities and processes

24. how knowledge is created, developed, shared and used in your organisation

25. your organisation's culture, values and work practice and how these may help or hinder effective knowledge management and sharing

26. the senior managers and key influencers in your organisation

Skills

1. Analysing
2. Assessing
3. Communicating
4. Decision-making
5. Evaluating
6. Forecasting
7. Influencing
8. Information management
9. Involving employees
10. Monitoring
11. Obtaining feedback
12. Planning
13. Presenting information
14. Providing feedback
15. Questioning
16. Reviewing

Manage information, knowledge and communication systems

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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; information; knowledge; communication systems

Develop knowledge and communicate information

Overview

This standard is about developing knowledge and communicating information to a wide range of employees. You make information available to those who require it. You implement agreed standards and processes, and provide training, support and guidance to employees. You identify risks, and work practices that hinder knowledge development, implementing changes to improve organisational information sharing. You also communicate information to those who require it, considering their personal communication preferences, and use different techniques to maintain their interest and ensure that they retain the knowledge shared. The standard also includes monitoring communication and the use of knowledge management standards, systems, tools and processes to make improvements.

This standard is for all managers and leaders.

Develop knowledge and communicate information

Performance criteria

You must be able to:

1. engage employees in your area of responsibility in developing their knowledge
2. identify where key knowledge is created, developed and shared in your area of responsibility
3. specify how information is made available to other departments or organisations
4. identify and access networks, communities and other sources of knowledge relevant to your area of responsibility
5. implement agreed standards and processes that support knowledge creation, development, sharing and capture to ensure that valuable knowledge is recorded
6. provide systems and tools to support the development, recording and sharing of knowledge
7. provide training, support and guidance to allow employees to use knowledge management systems and tools effectively
8. identify where work practices and behaviours hinder effective knowledge development and sharing
9. implement changes to improve knowledge development and sharing, when required
10. encourage employees to share knowledge and use knowledge management standards, systems, tools and processes
11. evaluate knowledge management risks and take action to manage them
12. protect intellectual property from unauthorised use
13. identify the information and knowledge employees require
14. communicate information and knowledge to those who require it, in accordance with policies
15. identify how employees prefer to receive information and knowledge and what media, languages, styles, timing and pace are most appropriate
16. check that the information and knowledge you are communicating are current, accurate and complete in line with your organisation's requirements
17. take action to minimise any interference or disruption to your communication
18. communicate in ways that help employees to understand the information and knowledge you are communicating and their relevance

Develop knowledge and communicate information

19. use a variety of techniques to gain and maintain employees' attention and interest and help them retain information and knowledge
20. adjust and fine-tune your communication in response to both verbal and non-verbal feedback
21. state the level of confidence that can be placed in the information and knowledge you are communicating
22. explain jargon, technical terms or abbreviations
23. confirm that employees have received and understood the information and knowledge you have communicated
24. monitor communication and the use of knowledge management standards, systems, tools and processes in your area of responsibility to ensure that knowledge is effectively captured and made available to those who may benefit from it
25. implement improvements to knowledge management standards, systems, tools and processes
26. follow the legal, organisational, codes of practice and policies relevant to developing knowledge and communicating information

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of knowledge management principles, the techniques used and good practice
2. the support and guidance employees may need to use knowledge management systems and tools
3. how to identify the work practices or behaviours that help or hinder effective knowledge management
4. how to encourage employees to share knowledge and use knowledge management standards, systems, tools and processes
5. how to ensure that knowledge developed through individual and group work activities is effectively captured and made available to those who may benefit from it
6. how to evaluate risks and manage significant risks involved in knowledge management
7. the importance of protecting intellectual property from unauthorised use, and how to do so
8. how to identify employees' needs for information and knowledge and their motivations for acquiring it
9. the importance of communicating information and knowledge only to those who have a right to it
10. how to establish employees' preferred communication media, languages, styles, timing and pace
11. the importance of checking the currency, accuracy and completeness of the information and knowledge you are communicating, and how to do so
12. how to take action to minimise any interference or disruption to your communication
13. the importance of structuring your communication in ways that facilitate employees' reception and understanding, and how to do so
14. the techniques that gain and maintain employees' attention and interest, help them retain information and knowledge, and how to use a variety of techniques
15. the importance of using verbal and non-verbal feedback to help you fine-tune your communication, and how to do so
16. the importance of communicating the information and knowledge, i.e. whether it is based on researched evidence, accepted facts or it is

Develop knowledge and communicate information

personal opinion

17. the importance of explaining jargon, technical terms or abbreviations

18. the importance of confirming that employees have received and understood the information and knowledge you have communicated, and how to do so

Industry and sector specific knowledge and understanding

19. the industry and sector requirements for knowledge management and communicating information

20. the legal, organisational, codes of practice and policies relevant to developing knowledge and communicating information

Context specific knowledge and understanding

21. how knowledge is created, developed, shared and used in your area of responsibility

22. how knowledge is exchanged with other departments or organisations

23. the networks, communities and other sources of knowledge relevant to your area of responsibility

24. your organisation's standards and processes to support knowledge management and the systems and tools available

25. the needs, motivations and preferences of the employees you are communicating with, and who has a right to the information and knowledge

26. the jargon, technical terms and abbreviations commonly used in the context in which you are working

Develop knowledge and communicate information

Skills

1. Analysing
2. Assessing
3. Communicating
4. Decision-making
5. Evaluating
6. Information management
7. Involving others
8. Monitoring
9. Obtaining feedback
10. Planning
11. Presenting information
12. Providing feedback
13. Questioning
14. Reviewing

Develop knowledge and communicate information

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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; knowledge, communication, information

Overview

This standard is about implementing and evaluating business plans. You put strategic and operational business plans into action by engaging and delegating work to colleagues, monitoring progress and adjusting plans, when necessary. You also evaluate the extent to which strategic and operational objectives have been achieved, learning lessons, celebrating success and recognising employees' contributions. This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. communicate your strategic business plan to colleagues and key stakeholders to engage their understanding and support
2. delegate responsibilities for achieving strategic objectives to individuals and gain their commitment to achieving them
3. evaluate risks to the achievement of strategic objectives and take action to mitigate risks
4. demonstrate your personal commitment by leading the achievement of key strategic objectives
5. review the strategic business plan at regular intervals, considering significant changes in the operating environment to ensure it can deliver the organisation's objectives within agreed timescales
6. communicate operational plans to gain the understanding and support of colleagues and key stakeholders
7. delegate responsibilities for achieving operational objectives to individuals and gain their commitment to achieving them
8. provide the resources required to achieve the objectives in your strategic and operational plans
9. hold employees to account for the achievement of the strategic and operational objectives delegated to them
10. use agreed methods and measures to monitor implementation of your business plans
11. provide advice, guidance and support towards achieving strategic and operational objectives, when required
12. apply indicators and methods for monitoring progress against your business plans at agreed intervals
13. evaluate variances from your business plans and the reasons for significant variances
14. ask colleagues to explain variances and propose action to address significant variances
15. adjust your business plans or the deployment of employees and resources to take account of significant variances, availability of employees and resources, or changes in your organisation's operating environment
16. inform colleagues of adjustments to your plans and help them make changes to their own plans
17. evaluate the implementation of your business plans to make recommendations that identify good practice and areas for improvement

18. evaluate and agree with colleagues and key stakeholders the extent to which the objectives in your strategic and operational business plans have been achieved
19. celebrate the achievement of strategic and operational objectives and recognise the contributions of those involved
20. analyse the reasons for any shortfalls in the achievement of strategic and operational objectives to inform the development and implementation of future business plans
21. follow the legal, organisational, codes of practice and policies relevant to implementing and evaluating business plans

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the principles and methods of strategic, operational management and business planning
2. how to consult with colleagues and other stakeholders
3. the importance of communicating business plans to employees and how to check their understanding of what is required
4. the principles and methods of delegation
5. how to hold employees to account for the achievement of objectives
6. how to assess and manage risk
7. the importance of demonstrating your personal commitment to business plans and how to do so
8. how to use resources effectively to achieve objectives
9. how to further develop and adjust the plan in the light of variances, including redeployment of employees and resources to implement the plan
10. how to monitor and review implementation of and performance against strategic and operational plans
11. the indicators and methods for measuring progress against plan and evaluating the implementation of plans
12. how to evaluate the implementation of business plans to identify and share the lessons learned

Industry and sector specific knowledge and understanding

13. the trends and developments in your industry and sector at local, national and international levels
14. the legal, organisational, codes of practice and policies relevant to implementing and evaluating business plans

Context specific knowledge and understanding

15. your organisation's vision, structure, strategy, culture, key stakeholders, communication and business processes
16. the customer feedback, financial and other management information that informs business planning in your organisation
17. the employees and resources available to achieve your organisation's strategic objectives
18. the trends and developments in your organisation's operating environment

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19. the threats to achieving your organisation's vision and strategy
 20. the ways of celebrating the achievement of your organisation's strategic objectives
 21. the sources of information you can use to monitor and evaluate plans and the procedures for reporting and making recommendations

Skills

1. Analysing
2. Communicating
3. Communicating
4. Consulting
5. Delegating
6. Evaluating
7. Influencing
8. Innovating
9. Involving colleagues
10. Leadership
11. Leading by example
12. Monitoring
13. Networking
14. Persuading
15. Planning
16. Presenting information
17. Prioritising
18. Problem solving
19. Providing feedback
20. Reflecting
21. Reviewing
22. Risk management
23. Setting objectives
24. Thinking strategically

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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LFA1, CFAM&LFA2
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; evaluate; strategic; business plans
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Manage business processes

Overview

This standard is about managing business processes. You identify organisational outputs and engage stakeholders in managing business processes. You design processes and identify the resources required to support them, making links between teams to create a complete system. The standard includes defining individual roles and responsibilities, providing training and support, and considering the factors that may affect how business processes work. You also develop and implement measures to monitor the processes, planning and implementing improvements when required.

This standard is for all managers and leaders.

Manage business processes

Performance criteria

You must be able to:

1. identify your organisation's outputs to meet customer and stakeholder needs
2. engage employees and stakeholders in managing business processes
3. design business processes that deliver outcomes in line with organisational strategy
4. identify the resources required for business processes
5. secure the resources required for business processes
6. assess business processes to ensure they make effective, efficient and sustainable use of resources
7. identify and take account of factors that may affect how business processes work
8. link business processes so that they interact across the organisation to form a complete system
9. define employees' roles and responsibilities within business processes
10. identify the training, support and supervision requirements for teams and employees
11. provide training, support and supervision to enable employees to carry out their defined roles and responsibilities
12. develop measures to manage business processes effectively
13. implement measures to manage business processes effectively
14. review business processes at regular intervals, and in light of changes in customer needs or organisational strategy
15. identify how the processes can be improved
16. plan improvements to business processes
17. implement improvements to business processes
18. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to manage business processes

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage employees and other stakeholders in managing business processes.
2. the principles and models of effective process management and how to define business processes
3. the types of business process measures and how to assess their suitability
4. how to calculate the resources needed for business processes
5. how to ensure processes and resources are sustainable and effective in their use, and the importance of doing so
6. the difference between process outputs and outcomes
7. how to assess process changes for risk and return against their potential investment cost
8. how to carry out cost-benefit analyses
9. types of analytical and problem-solving tools that you can use when developing business processes
10. how to evaluate the business processes
11. how to measure the effect of changes in the business process

Industry and sector specific knowledge and understanding

12. the relevant sector trends, developments and competitor performance that affect your business processes
13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to manage business processes

Context specific knowledge and understanding

14. your organisation's aims, goals, structure, values and culture
15. how your organisation adds value through its products, services and processes
16. the needs of your actual and potential customers and other stakeholders
17. the employees in your organisation, their roles and responsibilities, competences and potential in relation to business processes
18. your organisation's products, services and processes, the interdependencies between them and measures of performance

Manage business processes

Skills

1. Analysing
2. Assessing
3. Communicating
4. Influencing
5. Information management
6. Involving employees
7. Monitoring
8. Negotiating
9. Persuading
10. Presenting information
11. Prioritising
12. Problem solving
13. Reviewing
14. Thinking creatively
15. Thinking systematically

Manage business processes

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Original URN	CFAM&LFA3
Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; manage; business processes

Manage programmes of work or projects

Overview

This standard is about managing programmes of work or projects for which you have been given responsibility to achieve strategic goals. You meet with sponsors or stakeholders to confirm the key programme or project objectives and identify the links with organisational needs. You confirm resource requirements and deploy these, monitoring programme or project progress and taking action to respond to changes. The standard also includes communicating progress and results. The standard includes delivering projects on time, within budget, to the satisfaction of project sponsors and stakeholders. This standard is for all managers and leaders.

Manage programmes of work or projects

Performance criteria

You must be able to:

1. establish overall programme or project objectives and link these to strategic goals
2. discuss and agree the objectives and scope of programme or project with sponsors and stakeholders
3. confirm the available resources with the sponsors and stakeholders
4. identify how the proposed programme or the project fit with the overall vision, objectives and plans of your organisation
5. develop a programme or a project plan in consultation with project team members
6. agree the programme or the project plan with sponsors and stakeholders, making changes, where necessary
7. brief project team members on the final programme or project plan and their roles and responsibilities
8. provide ongoing support, encouragement and information to project team members
9. deploy resources in line with the requirements and priorities of the programme or a project
10. implement processes and resources to manage potential risks arising from the project and deal with contingencies
11. implement the programme or project plan, selecting and applying project management tools and techniques to monitor, control and review progress
12. establish the contribution different stages of the programme or the project to achieve the overall objectives
13. assess and manage risks for different milestones of the programme or the project
14. ensure your colleagues fulfil their responsibilities for the achievement of different stages of the programme or the project
15. monitor the programme or the project to ensure it achieves its objectives on time and within budget
16. communicate progress and results of the programme or the project and its different stages to colleagues and stakeholders
17. change the programme or project plan to respond to problems encountered or changes to organisational objectives
18. obtain agreement to programme or project plan changes from project sponsors and other stakeholders, where necessary
19. deliver programme or project objectives on time and within budget

Manage programmes of work or projects

20. confirm satisfactory completion of the project with the project sponsor and any key stakeholders
21. make recommendations which identify good practice and areas for improvement
22. evaluate the success of the project, identifying what lessons can be learned and shared
23. celebrate the completion of the project, recognising the contributions of project team members
24. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to manage programmes or projects

Manage programmes of work or projects

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the characteristics of programme or projects as opposed to routine management functions, activities and their key stages
2. the role and key responsibilities of a project manager, including the importance of the relationship between the project manager, sponsors and stakeholders
3. why it is important to discuss and agree the key objectives and scope of a proposed programme or a project with sponsors and stakeholders before detailed planning commences
4. why it is important to be able to identify and understand how a programme or a project fits with the overall vision, objectives and plans of the organisation and any programmes of work or other projects being undertaken
5. why it is important to consult with employees to develop a project plan and the type of information needed for effective project planning
6. what should be included in a programme or a project plan, particularly activities, required resources and timescales and why the plan needs to be discussed and agreed with the project sponsors and any key stakeholders
7. how to brief programme or project team members on the plan, confirm their roles and responsibilities and provide ongoing support, encouragement and information
8. how to identify and manage potential risks and the importance of contingency planning
9. the type of changes that might need to be made to a programme or a project plan during implementation and the importance of agreeing these with the sponsors and stakeholders
10. why it is important to confirm satisfactory completion of the programme or the project with the sponsors and stakeholders
11. how to establish effective systems for evaluating the success of the programme or the project to identify lessons for the future and recognise the contributions of the team members

Industry and sector specific knowledge and understanding

12. the project management tools and techniques commonly used in the industry and sector
13. the legal, organisational, codes of practice and policies relevant to

Manage programmes of work or projects

your role and the activities being carried out to manage programme or projects

Context specific knowledge and understanding

14. the sponsors, stakeholders, agreed key objectives and scope of the plan and the resources available for the programme or the project
15. the overall vision, objectives and plans of the organisation and any other relevant programmes of work or other projects being undertaken
16. your organisation's project management methodology, tools and techniques used to monitor, control and review progress
17. the mechanisms for consulting on the development of the programme or project plan and the feedback received from relevant employees
18. the roles and responsibilities of programme or project team members and the methods used for briefing, supporting, encouraging and providing information to them

Manage programmes of work or projects

Skills

1. Acting assertively
2. Analysing
3. Balancing competing needs and interests
4. Communicating
5. Decision-making
6. Delegating
7. Influencing
8. Information management
9. Involving employees
10. Leadership
11. Managing conflict
12. Managing programmes
13. Managing projects
14. Monitoring
15. Motivating
16. Negotiating
17. Planning
18. Presenting information
19. Prioritising
20. Problem solving
21. Providing feedback
22. Questioning
23. Reporting
24. Risk management
25. Setting objectives
26. Stress management
27. Team building
28. Thinking strategically
29. Thinking systematically
30. Time management

Manage programmes of work or projects

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; manage programmes
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Develop and implement marketing plans

Overview

This standard is about developing and implementing marketing plans for your area of responsibility. It covers understanding of your markets and customers by gathering and reviewing data, and consulting specialists when required. You evaluate current and potential markets and customers, and how your organisation delivers products and services compared to your competitors.

You engage colleagues and stakeholders in the development of marketing plans for target markets for your organisation's products and services. You discuss your plans and budgets with senior management to gain their commitment and secure the resources you require. You implement your plans, brief the colleagues involved and provide training and support. The standard also includes monitoring your marketing activities and reporting on performance.

This standard is for all managers and leaders.

Develop and implement marketing plans

Performance criteria*You must be able to:*

1. engage colleagues and stakeholders in developing and implementing marketing plans
2. identify and prioritise marketing objectives for your area of responsibility
3. check that marketing objectives are consistent with your organisation's overall business plan, culture, vision and values
4. consider the needs of other areas of your organisation when developing marketing objectives
5. obtain advice and support from marketing specialists and those providing marketing services, as required
6. engage colleagues within your organisation and stakeholders in developing understanding of your markets and customers
7. review the available customer data and information
8. review the available data and information about your markets
9. carry out research to develop understanding of your organisation's markets and customers
10. evaluate information on current and potential markets for your products and services to identify the characteristics that distinguish market segments
11. evaluate current and potential customers to identify their behaviour, needs and expectations
12. evaluate the extent to which current and potential customers' needs and expectations are being met by your organisation's or competitor's products and services
13. evaluate current and potential developments in your sector, including competitors' activities
14. evaluate opportunities to enter new markets
15. assess the opportunities to introduce innovations that meet customers' needs
16. establish why customers select specific products and services, either your organisation's or your competitors'
17. identify any threats to, and weaknesses in, your organisation's products and services
18. provide data and information about markets and customers to help managers take decisions
19. develop marketing plans and budgets for the achievement of the strategies, setting out clear actions, risks, contingencies, responsibilities and milestones

Develop and implement marketing plans

20. discuss marketing plans and budgets with senior management and stakeholders
21. confirm the commitment of senior management and stakeholders to your marketing plans and providing the necessary employees and resources
22. identify and access the employees and other resources required for your marketing plans
23. communicate your marketing plans to ensure the understanding and commitment of colleagues and the support of stakeholders
24. ensure that those involved in implementing marketing plans understand their individual responsibilities and are committed to achieving objectives
25. provide training, support and supervision to enable colleagues to carry out their responsibilities
26. implement marketing plans as agreed, whilst responding flexibly to responses from customers and changes in the markets, including competitor activity
27. monitor the implementation and performance of your marketing plan against milestones and budgets
28. take action to address any significant variances in performance against the plan
29. report on the performance of your marketing plans to senior management and stakeholders
30. seek authority to make any significant changes to marketing plans, where required
31. evaluate the implementation of your marketing plans and use the information to improve future marketing planning
32. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to develop and implement marketing plans

Develop and implement marketing plans

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage employees within your organisation and stakeholders in developing and implementing marketing plans
2. how to identify, develop and prioritise marketing objectives for your area of responsibility that are consistent with your organisation's overall business plan
3. the importance of obtaining advice and support from marketing specialists and those providing services, as required
4. how to engage colleagues within your organisation and other stakeholders in developing understanding of your markets and customers
5. where you can get information about your customers and the market and the advantages and disadvantages of different sources
6. how you can get information on competitors or similar organisations
7. how to assess sources of information about your customers and the market to see how suitable they are to use
8. the sources of professional market research expertise
9. the methods of gaining customer feedback, and the costs and benefits associated with them
10. how to analyse, measure and assess data and turn it into information that is suitable for business purposes
11. how information software products can help you collect and analyse information
12. the principle that customers buy products and services for the benefits they give them
13. the principle of trying to secure competitive advantage so that more customers will prefer the products and services of your organisation
14. how to identify and target markets by developing appropriate strategies for realising marketing objectives
15. how to develop marketing plans and budgets for the achievement of the strategies, setting out clear actions, accountabilities and milestones and the importance of agreeing these
16. how to identify and access the resources and capabilities required for your plans

Develop and implement marketing plans

- 17. the importance of communicating plans to employees and ensure understanding and commitment, and how to do so effectively
- 18. the importance of ensuring the commitment of senior management and other stakeholders to your marketing plans, and how to do so effectively
- 19. how to identify and provide employees with the training, support and supervision they need to carry out their marketing responsibilities
- 20. how to monitor and report on the implementation and performance of plans against milestones and budgets
- 21. the importance of taking action to address any significant variances in performance against the plan, and how to do so effectively
- 22. the importance of identifying ways in which future marketing planning can be improved
- 23. how to produce and implement measures and methods for evaluating the development and implementation of marketing plans

Industry and sector specific knowledge and understanding

- 24. the industry and sector requirements for developing and implementing marketing plans
- 25. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to develop and implement marketing plans

Context specific knowledge and understanding

- 26. your organisations' overall business plan relevant to your area of responsibility
- 27. the sources of advice and support from marketing specialists and marketing service providers
- 28. your organisation's products and services, their features and potential benefits
- 29. your organisation's actual and potential customer base
- 30. the competitors for your products and services
- 31. the available organisational resources and capabilities to support your plans

Develop and implement marketing plans

Skills

1. Analysing
2. Communicating
3. Consulting
4. Decision-making
5. Forecasting
6. Involving others
7. Planning
8. Presenting information
9. Prioritising
10. Setting objectives
11. Thinking creatively
12. Thinking strategically
13. Communicating
14. Consulting
15. Delegating
16. Evaluating
17. Involving others
18. Monitoring
19. Motivating
20. Obtaining feedback
21. Presenting information
22. Problem solving
23. Providing feedback
24. Questioning
25. Reporting
26. Thinking with a focus on customers
27. Time management

Develop and implement marketing plans

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; marketing plans
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Plan and monitor the work of sales teams

Overview

This standard is about planning and monitoring the work of sales teams. You create sales and call plans for a team of sales staff. You select sales team structures and activities based on identified customer needs and selling opportunities, setting financial and sales activity targets. You also review selling procedures and monitor sales call effectiveness, adjusting plans when required.

This standard is for all managers and leaders.

Plan and monitor the work of sales teams

Performance criteria

You must be able to:

1. identify factors affecting sales trends for your organisation
2. measure the impact of trends on the existing sales structure and resources available
3. analyse the implications of trends for existing and future sales structures
4. evaluate the criteria your key customers use to choose suppliers, and how these impact your customers' buying practices
5. analyse sales resource requirements, based on information about the number, size and location of customers
6. identify potential gaps that need to be fulfilled to achieve sales targets
7. select an approach for structuring your sales team activities including territories, customer types and industry sectors
8. assign sales team members using the approach selected, matching their knowledge, abilities and skills to the requirements of customers within the relevant territories, customer types or sectors
9. identify customers and prospects to contact by telephone, email, or in person
10. estimate the time required to deal with your prospective or existing customers to sell effectively
11. set financial and sales activity targets for the sales team
12. review the selling procedures of the sales team to ensure that they can meet sales targets
13. monitor the effectiveness of sales call plans, identifying any significant variances from agreed targets
14. encourage members of sales teams to discuss new ideas for improvement and offer criticisms
15. make agreed tactical adjustments to call plans, where necessary, to achieve targets
16. follow the legal, organisational, codes of practice and policies relevant to planning and monitoring the work of sales teams

Plan and monitor the work of sales teams

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the different ways of structuring sales forces, including territory management, customer type and industry sector management, and the reasons for selecting each
2. the reasons why an organisation might establish, maintain or change its sales management structure
3. how sales structures are established and the factors to be considered when establishing an appropriate structure
4. the concept of 'preferred supplier' status as used by customers when selecting suppliers of products and services
5. the variety of procurement practices used by a range of organisations
6. how to prioritise calls according to the potential value and probability of a sale
7. how to develop a call plan, record the outcome of each call effectively and measure the success of sales calls
8. the techniques for motivating a sales force, including the use of tactical sales incentives
9. the exchange of ideas and criticism for performance improvement
10. the sources of general and specialist advice on effective resourcing of the sales team

Industry and sector specific knowledge and understanding

11. the legal, organisational, codes of practice and policies relevant to planning and monitoring the work of sales teams

Context specific knowledge and understanding

12. your own organisation's products and services, sales strategies, plans and targets, including those in relation to relevant key accounts
13. the employment contracts and current working practices of the sales team
14. the geographical spread of your organisation's potential and existing customers
15. the criteria used by your key customers to select their suppliers, and how they affect their procurement practice
16. your organisation's actual and potential competitors and partners and the key features of their selling strategies

Plan and monitor the work of sales teams

Skills

1. Analysing
2. Communicating
3. Decision-making
4. Evaluating
5. Information management
6. Involving employees
7. Monitoring
8. Obtaining feedback
9. Planning
10. Presenting information
11. Problem solving
12. Setting objectives
13. Thinking strategically
14. Thinking with a focus on customers

Plan and monitor the work of sales teams

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; manage; sales; teams
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Bid for contracts to supply products and services

Overview

This standard is about bidding for contracts to supply products and services following a formal tendering process. You identify tender opportunities, carry out targeted research amongst customers, and evaluate your organisation's capability and capacity to respond. You prepare tenders with financial quotations and present them to potential customers. You also evaluate potential trade-offs and respond to queries and objections. The standard includes negotiating contracts and asking for feedback to improve future bids.

This standard is for all managers and leaders.

Bid for contracts to supply products and services

Performance criteria

You must be able to:

1. engage colleagues and stakeholders in obtaining contracts to supply products and services
2. maintain systems to identify opportunities to bid to supply products and services
3. carry out targeted research amongst existing and potential customers to identify opportunities to tender to supply products and services
4. evaluate your organisation's capacity and capability to respond to opportunities to tender to supply products and services credibly and competitively
5. collaborate on tenders with other organisations with complementary capabilities, where appropriate
6. prepare tenders in line with customers' requirements, emphasising your organisation's capacity and capability and the unique features and potential benefits of your products and services
7. prepare financial quotations that take account of your organisations' financial objectives, the customer's ability to pay and your estimates of competitors' quotations
8. present your bids to potential customers, anticipating or pre-empting any queries and objections
9. evaluate potential trade-offs which will be beneficial both to the customer and to your organisation
10. respond to any queries or objections from potential customers
11. check the potential customers understand and accept your responses to objections and queries
12. negotiate contracts that meet both the new customer's and your organisation's requirements
13. ensure formal agreements are drawn up and signed which meet legal requirements
14. obtain feedback from customers identify how you can improve, in cases where you fail to obtain contracts
15. review the tendering process with colleagues and use the lessons learned to improve future bids
16. follow the legal, organisational, codes of practice and policies relevant to bidding for contracts

Bid for contracts to supply products and services

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage colleagues and stakeholders in obtaining contracts to supply products and services
2. the communication skills including active listening, asking different types of questions, clarifying points, and restating or rephrasing statements to check mutual understanding
3. how to conduct research to identify sales opportunities
4. how to prepare tenders which emphasise your organisation's capacity and capability and the unique features and benefits of your products and services
5. how to calculate the cost of supplying products and services and prepare competitive financial quotations
6. how to present tenders clearly and convincingly, anticipating customers' queries or objections, and how to do so
7. the importance of identifying trade-offs, whereby particular aspects of your offer might be enhanced whilst others of lesser importance might be reduced, and how to do so
8. the principles and methods of negotiation and how to reach agreements that are a 'win-win', to meet both the customer's and your organisation's requirements
9. what agreements to supply products and services should cover and how to draw these up
10. the importance of seeking feedback from customers to improve future tenders
11. the importance of reviewing the tendering process and identifying the lessons to be learned

Industry and sector specific knowledge and understanding

12. the industry and sector requirements, guidelines and codes of practice for procurement
13. the legal, organisational, codes of practice and policies relevant to bidding for contracts

Context specific knowledge and understanding

14. your organisation's financial objectives, stakeholders, tendering requirements, contractual requirements, products and services and their features and potential benefits to customers
15. your organisation's existing and potential customers, their needs

Bid for contracts to supply products and services

and motivations

16. your organisation's capacity and capability to supply products and services

17. other organisations that your organisation can collaborate with on tenders, including existing collaborators and potential new ones

Bid for contracts to supply products and services

Skills

1. Analysing
2. Communicating
3. Evaluating
4. Information management
5. Innovating
6. Involving colleagues
7. Negotiating
8. Networking
9. Obtaining feedback
10. Persuading
11. Planning
12. Presenting information
13. Prioritising
14. Reviewing
15. Thinking strategically
16. Thinking with a focus on customers

Bid for contracts to supply products and services

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; bid; contracts
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Sell products and services

Overview

This standard is about selling products and services. You identify customers' requirements and match products and services to their needs. You make proposals, explore any queries and objections, explaining the strengths of your organisation to meet their requirements. You interpret buying signals and close sales, recording the details in line with your organisation's processes.

This standard is for all managers and leaders.

Sell products and services

Performance criteria*You must be able to:*

1. contact customers identified as sales leads, accessing those who can make buying decisions
2. identify customer requirements through questioning and checking for understanding
3. summarise customer motivations, buying needs and interests
4. identify the key features and benefits of your relevant products and services, matching these to the needs identified
5. assess which products and services are suitable for customer needs
6. evaluate potential trade-offs which may be beneficial both to the customer and to your organisation
7. provide accurate information about products, services and prices
8. make proposals to match the customer's requirements
9. explore any queries or objections raised by the customer and identify any reasons holding the customer back from agreeing the sale
10. identify and prioritise any customer concerns
11. provide evidence of the strengths of your organisation and its products and services to address any concerns the customer may have
12. check that the customer agrees how any concerns can be overcome
13. interpret verbal and non-verbal buying signals given by the customer and act upon them to progress towards closing the sale
14. close the sale by gaining the commitment of the customer
15. agree future contact arrangements, including post-sales calls to confirm customer satisfaction where relevant
16. record all required details in line with organisation processes and procedures
17. follow the legal, organisational, codes of practice and policies relevant to selling products and services

Sell products and services

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the difference between influencers and decision makers and their relative roles in the decision-making process
2. the key stages in the sales cycle, and how to use this effectively in structuring the sales approach
3. the importance of active and empathetic listening, and of confirming understanding
4. the importance of questioning techniques and how to use these during the sales cycle
5. the difference between features and benefits, and how to use these in selling
6. the typical range of behaviours displayed by customers, including body language, and how to respond to these constructively in a sales situation
7. the typical objections that can arise in a selling situation and how to manage these
8. how to evaluate potential trade-offs to achieve a 'win-win', whereby particular aspects of the product or service's package might be enhanced whilst others of lesser importance might be reduced, for the benefit of both your customer and your organisation
9. the effective methods for closing sales and confirming customer commitment

Industry and sector specific knowledge and understanding

10. the legal, organisational, codes of practice and policies relevant to selling products and services

Context specific knowledge and understanding

11. your organisation's sales plans and objectives, including its target market, key customers and their requirements from your products and services
12. your organisation's products and services, their features and potential benefits
13. your organisation's structure and lines of decision-making related to sales
14. the current competitor sales activities, the key features of their products and services, including how they compare with your organisation's products and services

Sell products and services

15. your own sales targets and how to create plans for achieving these
16. your organisation's sales process and procedures, including recording requirements
17. the available literature and materials to support the selling process

Sell products and services

Skills

1. Assessing
2. Communicating
3. Empathising
4. Information management
5. Innovating
6. Negotiating
7. Obtaining feedback
8. Persuading
9. Presenting information
10. Prioritising
11. Problem solving
12. Questioning
13. Reflecting
14. Thinking with a focus on customers

Sell products and services

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; sell; products; services
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Develop a customer-focused organisation

Overview

This standard is about developing a customer-focused organisation. You define your organisation's values and beliefs, assessing how you provide customer service at key points. You produce plans to implement customer-focused approaches, agree them with stakeholders and communicate them to colleagues. You also develop employee skills, behaviours and attitudes that puts customers first. The standard includes collaborating with other organisations, undertaking joint activities with customers and making improvements based on analysis.

This standard is for all managers and leaders.

Develop a customer-focused organisation

Performance criteria

You must be able to:

1. define customer-focused organisational values and beliefs
2. assess the level of customer service your organisation is currently providing
3. produce plans to put customers at the heart of achieving your organisation's vision and strategic objectives
4. communicate your plans to key stakeholders and decision-makers to secure their agreement to your approach
5. review processes and systems throughout the organisation to ensure they are customer-focused
6. communicate your plans for embedding customer-focused approaches to colleagues to gain their commitment
7. develop employee skills, behaviours and attitudes to build a culture that puts customers first
8. implement processes and systems that reinforce staff commitment to providing service that meets or beats customers' expectations
9. establish collaborations with other organisations to maintain and improve services to customers, where appropriate
10. undertake joint activities with customers to identify improvements to the level of customer service provided by your organisation
11. model behaviour that shows, and inspires employees to show, respect, helpfulness and cooperation
12. analyse the level of customer service your organisation is providing at specified intervals, in accordance with your plan
13. make improvements to the level of customer service provided by your organisation based on analysis and feedback
14. follow the legal, organisational, codes of practice and policies relevant to developing a customer-focused organisation

Develop a customer-focused organisation

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the principles of effective customer service, the factors that make customers satisfied
2. how to measure the level of customer service being provided and why it is important
3. the benefits of forming collaborations with other organisations to maintain and improve customer service
4. the best practice in customer service outside your own sector
5. the techniques for developing employee skills, behaviours and attitudes, and how to motivate them to deliver excellent service to customers
6. how to design and manage processes and systems focused on customers' needs

Industry and sector specific knowledge and understanding

7. the current and emerging trends that are likely to affect your products and services
8. the developments in technology that support customer service
9. the legal, organisational, codes of practice and policies relevant to developing a customer-focused organisation

Context specific knowledge and understanding

10. your organisation's products and services, vision, objectives and associated plans
11. your organisation's customers and their needs
12. the strengths and weaknesses of your organisation in terms of satisfying customers
13. how a change in your market structure, products or services will affect your customers
14. the activities and services of your competitors or similar organisations, and how this may affect your abilities to be customer-focused

Develop a customer-focused organisation

Skills

1. Building consensus
2. Communicating
3. Empowering
4. Evaluating
5. Leadership
6. Monitoring
7. Motivating
8. Reviewing
9. Thinking strategically
10. Thinking with a focus on customers

Develop a customer-focused organisation

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Originating Organisation	Instructus
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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; develop; customer-focused organisation

Deliver products and services to customers

Overview

This standard is about delivering products and services to customers. You establish customer expectations and design processes to meet them. You measure customer satisfaction with the processes, products and services your organisation delivers. You ensure that colleagues are briefed on their roles and responsibilities, are trained and supported, and have access to processes and resources to provide customer-focused service. You also monitor colleagues against your organisation's values to nurture them to perform to the required standard, recognising their contributions and rewarding their successes. This standard is for all managers and leaders.

Deliver products and services to customers

Performance criteria*You must be able to:*

1. specify your organisation's customer-focused values
2. engage colleagues and stakeholders in delivering products and services to customers
3. establish customers' expectations in terms of products, services and the ways to deliver these
4. design organisational processes to deliver products and services to customers' expectations
5. manage organisational processes to deliver products and services to customers' expectations
6. check that colleagues are briefed on processes and customers' expectations
7. communicate colleagues' roles and responsibilities in meeting customer expectations, including any agreed standards of customer service
8. empower colleagues to meet or beat customers' expectations
9. provide training, support, supervision and other resources when required
10. establish sustainable processes to support customers and resolve any problems
11. monitor that the day-to-day behaviour of colleagues against your organisation's customer-focused values
12. develop a culture which nurtures, respects, values, recognises and rewards employees who work in the 'front-line' directly with customers
13. identify processes for monitoring levels of customer satisfaction with products, services and the ways these are delivered
14. operate processes for monitoring levels of customer satisfaction
15. evaluate the delivery of products and services to make recommendations for improvements
16. demonstrate increasing levels of customer satisfaction with the organisation's products, services and processes
17. follow the legal, organisational, codes of practice and policies relevant to delivering products and services to customers

Deliver products and services to customers

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage colleagues and other stakeholders in delivering products and services to customers
2. the difference between customer service and customer satisfaction
3. the factors that make customers satisfied and continue to buy from you
4. the importance of achieving customer satisfaction in a competitive environment or an environment where high levels of service are expected
5. the best practice in customer service outside your own sector
6. the types of customer survey available and effective ways of collecting feedback
7. the techniques for motivating staff to deliver excellent service to customers
8. how information and communications technology can support customer service and help measure customer satisfaction
9. how to design and manage processes and systems focused on customers' needs

Industry and sector specific knowledge and understanding

10. the current and emerging trends that are likely to affect your products and services
11. the developments in technology and how these will affect your work with customers
12. the legal, organisational, codes of practice and policies relevant to delivering products and services to customers

Context specific knowledge and understanding

13. your organisation's vision, objectives, plans, values, stakeholders, products and services, and customers
14. the strengths and weaknesses of your products and services in terms of customer satisfaction
15. the customer satisfaction survey, feedback and measuring methods that are suitable for your organisation and why
16. the activities and services of your competitors or similar organisations and how this may affect your products, services and processes

17. the organisations that your customers compare your organisation against

Deliver products and services to customers

Skills

1. Communicating
2. Empowering
3. Evaluating
4. Involving others
5. Leadership
6. Monitoring
7. Motivating
8. Obtaining feedback
9. Persuading
10. Presenting information
11. Problem solving
12. Providing feedback
13. Questioning
14. Reviewing
15. Thinking with a focus on customers

Deliver products and services to customers

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Originating Organisation Instructus

Original URN CFAM&LFD2

Relevant Occupations Managers and Senior Officials

Suite Management and Leadership

Keywords Management & leadership; deliver; products; services; customers

Manage customer service

Overview

This standard is about managing customer service. You organise employees and resources to deliver customer service in accordance with your organisation's standards. You provide customer service training and support to enable staff to provide service autonomously to specified levels. The standard includes responding to customers who are referred to you, monitoring customer service performance, obtaining feedback and analysing data to identify improvements and recommend changes to processes, systems and standards.

This standard is for all managers and leaders.

Manage customer service

Performance criteria*You must be able to:*

1. engage colleagues and stakeholders in managing customer service
2. establish measurable standards of customer service, considering customers' expectations and your organisation's resources
3. organise colleagues and resources to meet customer service standards, taking account of varying levels of demand and likely contingencies
4. measure colleagues competence to ensure they can deliver the required level of customer service
5. provide training, support and supervision to colleagues when required
6. communicate the standards of customer service that colleagues are expected to deliver
7. outline colleagues' level of autonomy for responding to customers' requests and problems
8. respond to customers' requests and problems referred to you
9. seek advice from specialists and/or more senior managers, where necessary
10. keep customers informed about the actions you are taking to deal with their requests and problems
11. obtain feedback on staff and customer perceptions of the standards of customer service your organisation delivers
12. monitor the customer service delivered, customers' requests, problems and feedback against your organisation's standards for customer service
13. analyse your organisation's customer service data to identify the causes of problems
14. identify opportunities for improving customer service based on feedback and monitoring
15. recommend changes to processes, systems or standards to improve customer service
16. follow the legal, organisational, codes of practice and policies relevant to managing customer service

Manage customer service

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage colleagues and stakeholders in managing customer service
2. how to establish clear and measurable standards of customer service, considering customers' expectations and your organisation's resources
3. how to organise staffing and other resources to meet customer service standards, including the importance of taking account of varying levels of demand and likely contingencies
4. the importance of ensuring customer service staff are competent to carry out their duties, and how to provide any necessary training and support
5. the importance of ensuring staff understand the standards of customer service they are expected to deliver
6. the extent of staff autonomy for responding to customers' requests and problems, and when to refer these to a senior staff member
7. the importance of taking responsibility for dealing with customers' requests and problems referred to you, and keeping them informed about the actions you are taking
8. how to monitor the standards of customer service delivered
9. identify and manage potential issues before they develop into problems, customers' requests and feedback (from staff and customers), and the importance of doing so
10. the types of customer service data available and how to analyse it to identify the causes of problems and opportunities for improving customer service
11. the importance of making or recommending changes to processes, systems and standards to improve customer service, and how to do so

Industry and sector specific knowledge and understanding

12. the industry and sector requirements for the delivery of customer service
13. the legal, organisational, codes of practice and policies relevant to managing customer service

Context specific knowledge and understanding

14. your organisation's stakeholders and their interests, and available resources

Manage customer service

15. your organisation's customers and their expectations of customer service
16. the types of problems that occur and your organisation's complaints policy and procedures
17. your organisation's staffing in relation to delivering customer service
18. the sources of advice, guidance and support from customer service specialists or more senior managers

Manage customer service

Skills

1. Acting assertively
2. Analysing
3. Communicating
4. Information management
5. Managing conflict
6. Monitoring
7. Obtaining feedback
8. Planning
9. Problem solving
10. Reviewing
11. Team building
12. Thinking with a focus on customers
13. Valuing and supporting members of staff

Manage customer service

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Version Number	1
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Status	Original
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Originating Organisation	Instructus
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Original URN	CFAM&LFD3
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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; manage; customer service
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Manage quality assurance systems

Overview

This standard is about managing quality assurance systems. You check systems to ensure that business processes consistently deliver products and services that meet customers' and other stakeholders' quality expectations and legal and regulatory requirements. You check that staff are competent and encourage them to take responsibility for achieving quality standards, motivating them to contribute to continuous improvement. You also detect, record and correct any shortfalls in quality and develop actions plans.

This standard is for all managers and leaders.

Manage quality assurance systems

Performance criteria

You must be able to:

1. ensure that your organisation's quality standards can deliver the quality of products and services your customers expect
2. check that quality standards allow you to obtain any expected quality marks, awards or accreditation
3. confirm that quality standards are in line with your organisation's values, aims and objectives
4. establish systems, plans and resources to ensure quality standards are met and maintained
5. specify staff roles and responsibilities in meeting quality standards
6. check that staff are competent to fulfil their specified roles
7. identify and assess risks of shortfalls in the quality of processes, products and services
8. mitigate risks by taking preventative action in line with organisational procedures
9. encourage colleagues to take personal responsibility for achieving quality standards and to address or report any actual or potential shortfalls
10. obtain sufficient, valid information from your quality assurance system and other sources, including customers, to evaluate if processes, products and services are meeting the required standards
11. provide feedback to motivate colleagues to maintain quality standards and improve performance
12. detect and record any shortfall in the quality of processes, products and services
13. investigate the causes of shortfalls and take corrective action within the required timescales
14. report quality performance, including shortfalls and corrective actions taken, to stakeholders within agreed timescales
15. encourage customers and colleagues to identify and recommend improvements to your quality assurance system
16. develop plans to implement quality improvements which deliver significant benefits at reasonable cost and acceptable level of risk
17. agree quality action plans with decision makers
18. follow the legal, organisational, codes of practice and policies relevant to managing quality assurance systems

Manage quality assurance systems

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to keep up to date with current developments, tools and techniques in quality management, customers' and other stakeholders' quality expectations
2. the value of quality marks, awards and accreditation to profile of an organisation and its brands
3. how to ensure the quality standards to which you are working can deliver the quality of products and services your customers expect
4. the importance of ensuring systems and plans are in place to ensure quality standards are met and maintained, and how to do so
5. the importance of keeping employees up to date about their roles in meeting quality standards, and how to ensure they are competent to fulfil the roles
6. the importance of encouraging employees to take personal responsibility for achieving quality standards and address or report any actual or potential shortfalls in the quality of processes, products and services
7. the importance of obtaining sufficient, valid information to enable you to evaluate accurately whether processes, products and services are meeting the required standards, and how to do so
8. the importance of providing feedback to motivate employees to maintain quality standards and continuously improve performance, and how to do so
9. how to detect, record and report quality performance, including any shortfall in the quality of processes, products and services, and investigate the cause(s) and corrective action to taken
10. the importance of encouraging customers and those involved in delivering products and services to identify and recommend quality improvements
11. how to develop resourced plans to implement quality improvements which deliver significant benefits at reasonable cost and acceptable level of risk

Industry and sector specific knowledge and understanding

12. the industry and sector requirements for quality assurance and current developments
13. the legal, organisational, codes of practice and policies relevant to

Manage quality assurance systems

managing quality assurance

Context specific knowledge and understanding

14. your customers' and other stakeholders' expectations regarding quality
15. your organisation's values, aims and objectives, products and services
16. your organisation's quality standards and the available resources to ensure these are met and maintained
17. the sources of information (including your quality assurance system and customers), that enable you to evaluate whether processes, products and services are meeting the required organisational standards
18. the relevant quality marks, awards or accreditation for your organisation, and how the quality standards to which you are working can obtain these

Manage quality assurance systems

Skills

1. Assessing
2. Communicating
3. Decision-making
4. Evaluating
5. Influencing
6. Information management
7. Involving employees
8. Monitoring
9. Motivating
10. Obtaining feedback
11. Planning
12. Presenting information
13. Providing feedback
14. Questioning
15. Reporting
16. Setting objectives

Manage quality assurance systems

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Relevant Occupations	Managers and Senior Officials
Suite	Management and Leadership
Keywords	Management & leadership; manage; quality assurance systems

Carry out and participate in quality audits

Overview

This standard is about carrying out and participating in quality audits. You manage a programme of quality audits to ensure people are complying with your organisation's quality system and procedures. You carry out quality audits as part of a formal quality management system. You also prepare for, and participate in, quality audits of your own area of responsibility and take action to improve business processes, quality standards or procedures.

This standard is for all managers and leaders.

Carry out and participate in quality audits

Performance criteria

You must be able to:

Manage and carry out quality audits

1. engage colleagues and stakeholders in auditing compliance with your organisation's quality systems
2. establish the scope and objectives of quality audits
3. evaluate the risks of organisational processes not complying with quality systems
4. plan programmes of quality audits which prioritises the areas and processes at greatest risk
5. develop, support and supervise people to carry out audit programmes
6. allocate audits to people, based on their expertise and development needs
7. ensure colleagues responsible for organisational processes understand their roles within quality audits, and the requirements of quality systems and procedures
8. monitor progress of quality audits against planned programmes
9. revise audit activities in the event of significant variances or changes in organisational strategy, risk assessment or resource availability
10. evaluate the results of quality audits and report non-compliance and associated risks to senior management according to the level of urgency
11. provide feedback to auditees to enhance their confidence and commitment to quality
12. use audit results to inform risk assessment and future quality audit programmes
13. carry out quality audits according to a plan and schedule agreed, giving auditees the required period of notice
14. carry out quality audits in ways which enhance auditees' confidence in the quality system and their commitment to maintaining quality standards
15. define the scope of audits, the responsibilities of the auditees, the quality procedures and previous audit history
16. clarify the purpose of audits and the roles, responsibilities and expectations of yourself and the auditees
17. carry out an investigation of the auditees' work in sufficient detail to reveal any non-conformances with required quality procedures

Carry out and participate in quality audits

18. encourage auditees to co-operate fully to achieve the purpose of audits
19. share the results of audits with auditees
20. agree corrective actions to remedy any non-conformances and the date by which the actions should be carried out
21. check with auditees that corrective actions have been carried out by agreed dates
22. seek advice from your manager or quality specialists if you cannot agree actions with auditees
23. escalate any non-conformances which present serious or immediate risks to your manager or quality specialists
24. identify and analyse any problems with processes and procedures and report your findings and any recommendations
25. keep complete records of quality audits giving access to authorised people
26. follow the legal, organisational, codes of practice and policies relevant to managing and carrying out quality audits

Participate in quality audits

27. establish the quality standards and procedures that apply to your area of responsibility
28. monitor work to ensure it consistently meets quality standards and complies with organisational procedures
29. check that records and documentation are complete, up to date and accessible
30. check that any corrective actions agreed in previous audits have been completed and that recommendations have been acted upon, where appropriate
31. provide the auditor with access to information, records and documentation
32. discuss the results of the audit to agree corrective actions to remedy any non-conformances and the date by which the actions should be carried out
33. discuss any areas where business processes, quality standards or procedures could be improved, with the auditor
34. create and carry out any corrective actions by agreed dates

Carry out and participate in quality audits

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. how to engage people within your organisation and other stakeholders in auditing compliance with your organisation's quality systems
2. the quality and risk management principles, methods, tools, techniques that can be used and current developments in best practice
3. how to prioritise areas and processes at greatest risk of non-compliance
4. how to develop a quality audit programme
5. the competences that quality auditors require
6. how to calculate the resources required to deliver a quality audit programme
7. how to monitor progress against plans and identify significant variances
8. how to provide feedback to auditees in ways which enhance their confidence and commitment to quality
9. how to carry out quality audits and the importance of doing so according to an agreed audit plan and schedule
10. the different ways of carrying out quality audits to enhance auditees' confidence in the quality system and their commitment to meeting and maintaining quality standards
11. the importance of giving auditees the required period of notice of your intention to audit
12. the importance of preparing carefully for the audits, and how to do so
13. how to carry out an investigation in sufficient detail to reveal any non-conformances
14. how to decide corrective actions to remedy each non-conformance, the date by which the actions should be carried out, and the importance of agreeing this with the auditees
15. how to identify and analyse inherent problems with processes and quality procedures and why it is important to report your finding and recommendations with an appropriate degree of urgency
16. the importance of checking with auditees that corrective actions have been carried out by agreed dates, and how to do so
17. how to keep complete records of quality audits and the importance

Carry out and participate in quality audits

of making your audit reports available to authorised people

18. how to identify the non-conformances that present serious or immediate risks to employees or to the organisation and the importance of promptly bringing this to the attention of your manager or quality specialists

19. how to monitor work to ensure it consistently meets quality standards and complies with procedures

20. the importance of ensuring that records and documentation are complete and up to date and how to make these readily accessible to auditors

21. how to identify areas where business processes, quality systems or procedures could be improved

Industry and sector specific knowledge and understanding

22. the industry and sector requirements for quality management and auditing

23. the legal, organisational, codes of practice and policies relevant to managing and carrying out quality audits

Context specific knowledge and understanding

24. your organisation's strategy, stakeholders, policies and procedures

25. the people in your organisation with responsibility for quality and the quality systems used

26. the culture and quality management systems in place in the organisation in which the audit is being carried out

27. the customers of the audit and their needs

28. the responsibilities of the auditees and the quality procedures that apply to their work

29. the sources of advice, guidance and support from your manager or quality specialists

30. the authorised personnel who should receive your audit reports

31. the quality standards and procedures that apply to your area of responsibility

32. the records and documentation required for your area of responsibility

33. the corrective actions and recommendations agreed in previous audits

Carry out and participate in quality audits

Skills

1. Assessing
2. Benchmarking
3. Communicating
4. Decision-making
5. Delegating
6. Evaluating
7. Information management
8. Interviewing
9. Involving employees
10. Monitoring
11. Planning
12. Presenting information
13. Problem solving
14. Providing feedback
15. Questioning
16. Reporting
17. Reviewing
18. Risk management
19. Thinking systematically

Carry out and participate in quality audits

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; quality audits; preparation; participation
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Overview

This standard is about providing healthy, safe and secure working environments and practices. You ensure that the physical environment and working practices in your area of responsibility comply with your organisation's health and safety policy statement and that resources are secure. You consult your team and representatives on health and safety issues, ensuring that systems are in place to identify and assess hazards and risks. You also take action to control or eliminate hazards, using specialists or referring concerns to colleagues when they are outside your limits of authority. The standard also includes setting up systems to monitor, measure and report on health, safety, security and productivity within your work area. You demonstrate your commitment to health, safety, security and productivity by setting a good example to your team.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. identify your personal responsibilities and liabilities under health and safety legislation
2. communicate your organisation's health and safety policy statement to employees in your area of responsibility and other colleagues
3. ensure the working environments and practices in your area of responsibility comply with your organisation's health and safety policy statement and are reviewed when required
4. check compliance with your organisation's health and safety policy statement following any significant changes to the environment, practices or legislation
5. consult employees in your area of responsibility or their representatives on health and safety issues, in line with organisational requirements
6. set up a system for identifying health and safety hazards in your area of responsibility
7. implement a risk assessment system in your area of responsibility
8. ensure that a system is in place for identifying and assessing risks to the security of resources in your area of responsibility
9. agree actions to eliminate or control identified hazards and manage identified risks
10. refer identified hazards and risks outside your level/area of authority to colleagues responsible for health and safety
11. ensure that the health and safety of employees and the security of resources and information are prime considerations when designing or reviewing working environments and practices
12. allocate sufficient resources across your area of responsibility to deal with health, safety and security issues
13. seek and make use of specialist expertise, where required
14. set up systems for monitoring, measuring and reporting of health, safety, security and productivity performance in your area of responsibility
15. demonstrate your personal commitment to health, safety, security and productivity through your actions
16. review the application of health and safety policy statement in your area of responsibility and make recommendations to inform future developments
17. follow the legal, organisational, codes of practice and policies

relevant to providing healthy, safe, secure and productive working environments and practices

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of health, safety and security in the workplace, your personal responsibilities and liabilities under health and safety legislation and how to keep up with legislative and other developments relating to health and safety
2. how to communicate the written health and safety policy statement to employees who work in your area of responsibility and other relevant parties
3. how to identify risks to the security of resources and information and actions you can take to mitigate these risks
4. how and when to consult with employees in your area of responsibility or their representatives on health, safety and security issues
5. the ways of developing a culture in your area of responsibility which puts health, safety and security first and the importance of setting a good example to employees
6. how to establish and use systems for identifying hazards and assessing risks, the actions that should be taken to control or eliminate them, and the type of resources required
7. how to establish systems for monitoring, measuring and reporting on health, safety and security performance in your area of responsibility
8. how and when to review the application of the written health and safety policy statement in your area of responsibility and produce/provide findings to inform future planning and decision-making

Industry and sector specific knowledge and understanding

9. the industry and sector-specific legislation, regulations, guidelines and codes of practice relating to health, safety and security
10. the legal, organisational, codes of practice and policies relevant to providing healthy, safe, secure and productive working environments and practices

Context specific knowledge and understanding

11. the employees with an interest in health, safety and security in your area of responsibility
12. your organisation's written health and safety policy statement and how it is communicated to employees at your organisation and to other relevant parties

13. the sources of specialist expertise available to support you in managing health, safety and security
14. the operational plans for your area of responsibility and the resources allocated to and across your area of responsibility for health, safety and security
15. the allocated responsibilities for health, safety and security in your area and your organisation in general
16. the systems in place in your area of responsibility for identifying hazards, assessing risks, taking actions and who to refer to when identified hazards or risks are outside your level and area of authority
17. the systems in place for monitoring, measuring and reporting of health, safety and security performance in your area of responsibility

Skills

1. Communicating
2. Consulting
3. Decision-making
4. Information management
5. Involving employees
6. Leadership
7. Monitoring
8. Planning
9. Presenting information
10. Prioritising
11. Questioning
12. Reporting
13. Reviewing
14. Risk management
15. Thinking systematically

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Relevant Occupations	Managers and Senior Officials
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Suite	Management and Leadership
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Keywords	Management & leadership; healthy; safe; productive; working environment; practices
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Overview

This standard is about producing and procuring products and services from external suppliers. You engage with colleagues to take decisions about whether to produce products and services within your organisation or whether to buy them from other organisations. You review capacity and capability of your own and suppliers to produce the products and services identified. You make decisions by analysing costs, benefits and risks, considering ethics and sustainability. The standard includes creating specifications and selecting suppliers that best meet your organisation's requirements. You monitor the performance of suppliers and resolve any problems that arise, reviewing your decisions to align with changes in your operating environment.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. engage colleagues and key stakeholders in deciding whether to produce or buy in products and services
2. establish your organisation's requirements for products and services
3. establish whether your organisation has the capability and capacity to produce required products and services, or could develop capability and capacity in the timescale required
4. identify potential suppliers and evaluate their capability and capacity to supply required products and services in the timescale required
5. analyse the costs of producing products and services in-house, including the benefits of developing new capability and expertise
6. analyse the costs of buying in products and services, including procurement processes and the benefits of collaborative arrangements
7. evaluate the risks involved in producing products and services compared to buying them in
8. review ethical and sustainability considerations and the interests of key stakeholders
9. decide whether to produce or buy in products and services based on your analysis of costs and benefits, risks, review of ethical and sustainability considerations, and the interests of key stakeholders
10. record and communicate your decision, explaining your rationale and the assumptions made
11. seek support from colleagues, procurement or legal specialists when required
12. create specifications for products and services to meet your organisation's requirements
13. identify a diverse range of products and services suppliers to compare options
14. select products and services suppliers which offer the optimal mix of quality, cost, timeliness and reliability
15. negotiate with selected suppliers to reach an agreement which offers value for money and is acceptable to both parties
16. agree a contract which states the quality and quantity of products and services to be supplied, timescales, costs, terms and conditions, and the consequences if either party fails to comply with the contract

17. monitor the performance of suppliers in terms of the quality, timeliness and reliability of products and services
18. resolve any supplier problems, in accordance with the terms of the contract
19. review your decisions to produce or buy in products and services at agreed intervals, taking account of the actual costs and benefits and any changes in your organisation's operating environment
20. follow the legal, organisational, codes of practice and policies relevant to procuring products and services

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of consulting with colleagues to identify requirements for products and services and decisions to produce or buy in products and services
2. how to draw up detailed specifications for procuring products and services
3. how to source products and services and compare alternative suppliers
4. how to select products and services suppliers which offer the optimal mix of quality, costs, timeliness and reliability
5. how to negotiate with selected suppliers to reach an agreement which offers value for money and is acceptable to both parties
6. the importance of agreeing a contract which clearly states quality and quantity of products and services, timescales and costs, terms and conditions, and consequences if either party fails to comply with the contract
7. how to monitor the performance of suppliers in terms of the quality, timeliness and reliability of products and services
8. the importance of taking prompt action to resolve any problems with the performance of suppliers, in accordance with the terms of the contract, and how to decide what action should be taken and when
9. how to evaluate your organisation's actual or potential capability and capacity to produce required products and services
10. how to evaluate the capability and capacity of potential suppliers
11. how to carry out cost-benefit analyses and identify and evaluate risks
12. the decision-making principles, methods, tools and techniques and how to apply them
13. the importance of carrying out regular reviews of your decisions to produce or buy in products and services, and how to do so

Industry and sector specific knowledge and understanding

14. the industry and sector requirements for procuring products/services
15. the legal, organisational, codes of practice and policies relevant to procuring products and services

Context specific knowledge and understanding

16. the sources of advice, guidance and support from colleagues or procurement or legal specialists on any aspect of procuring products and services about which you are unsure
17. the limits of your own knowledge, skills and competence and whom to consult with to identify your requirements for products and services and suppliers, where necessary
18. the sources of products and services suppliers which meet your organisation's requirements
19. your organisation's strategic objectives, values, key stakeholders, business activities, processes and requirements for products and services
20. your organisation's ethical and sustainability considerations that may impact on your decisions

Skills

1. Analysing
2. Assessing
3. Communicating
4. Consulting
5. Decision-making
6. Evaluating
7. Forecasting
8. Information management
9. Involving others
10. Influencing
11. Monitoring
12. Negotiating
13. Obtaining feedback
14. Planning
15. Presenting information
16. Problem solving
17. Reporting
18. Reviewing
19. Thinking systematically
20. Thinking strategically

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Select suppliers through a tendering process

Overview

This standard is about selecting suppliers to supply products and services through a formal tendering process against a specification. You create a specification for the products and services and invite prospective suppliers to tender, providing information about the process and requirements. You develop criteria to evaluate tenders and apply them to identify the supplier who best meets your needs. You also contract with the successful supplier and give feedback to unsuccessful bidders following your organisation's procedures.

This standard is for all managers and leaders.

Select suppliers through a tendering process

Performance criteria

You must be able to:

1. seek support from colleagues or procurement or legal specialists on any aspects of tendering about which you are unsure
2. produce a specification which describes the products and services required, including information on quality, time and cost constraints
3. invite a number and range of suitably qualified prospective suppliers to tender, proportionate to the value of the contract and the diversity of suppliers available
4. provide full information about the tendering process
5. confirm deadlines for receipt of tenders
6. outline contract details
7. specify how pre-tender queries will be dealt with
8. respond to pre-tender queries so that all prospective suppliers have the same information available to them
9. establish criteria to allow tenders to be evaluated fairly so that the supplier that provides the optimal mix of quality, cost, timeliness and reliability can be selected
10. receive, record and open tenders in line with your organisation's procedures
11. evaluate tenders, by yourself or with others as required, applying your criteria
12. seek clarification from prospective suppliers where necessary
13. offer a contract to supply the products and services to the supplier whose tender was evaluated most highly
14. inform unsuccessful prospective suppliers of the outcome of the evaluation and provide them with feedback where appropriate
15. resolve any post-tender queries with unsuccessful suppliers
16. follow the legal, organisational, codes of practice and policies relevant to selecting suppliers through a tendering process

Select suppliers through a tendering process

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the importance of following organisational procedures and legal and ethical requirements when selecting suppliers
2. how to draw up a specification describing the products and services required, including information on quality, time and cost constraints, where appropriate
3. the importance of communicating information clearly, concisely and accurately, and how to do so
4. how to identify suitably qualified prospective suppliers to tender, taking account of the value of the contract and the diversity of suppliers available
5. the importance of including full information about the tendering process, deadlines for receipt of tenders, contract details and how pre-tender queries will be dealt with
6. how to deal with pre-tender queries in ways which ensure all prospective suppliers have the same information available to them
7. how to establish clear criteria and how to evaluate the tenders fairly, using the criteria, and select the supplier that provides the optimal mix of quality, cost, timeliness and reliability
8. how to evaluate tenders rigorously and the importance of seeking clarification from prospective suppliers, where necessary
9. the importance of informing unsuccessful prospective suppliers of the outcome of the evaluation and providing them with feedback, where appropriate
10. how to resolve any post-tender queries with unsuccessful suppliers promptly and effectively

Industry and sector specific knowledge and understanding

11. the industry and sector requirements for selecting suppliers
12. the legal, organisational, codes of practice and policies relevant to select suppliers through a tendering process

Context specific knowledge and understanding

13. your organisation's procedures and legal and ethical requirements for selecting suppliers
14. the limits of your own knowledge, skills and competence and the sources of advice, guidance and support available (from colleagues or procurement or legal specialists) on any aspects of tendering for

Select suppliers through a tendering process

supplies about which you are unsure

15. the details of the specifications about products and services required

16. the diversity of suppliers available to you in your role and how to contact them

Select suppliers through a tendering process

Skills

1. Assessing
2. Communicating
3. Decision-making
4. Evaluating
5. Presenting information
6. Problem solving
7. Providing feedback
8. Questioning
9. Reviewing
10. Setting objectives
11. Time management

Select suppliers through a tendering process

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Outsource business processes

Overview

This standard is about outsourcing business processes which are not part of your organisation's core competences. You identify non-core business processes with potential to outsource, assessing the benefits and risks that outsourcing may have for your organisation. You produce outsourcing business cases and present these to decision-makers to confirm agreement. You also manage the human resource implications linked to outsourcing. The standard includes developing a specification to support vendor tendering, inviting vendors to submit tenders and assessing applications to select the most suitable supplier. You work with legal specialists to negotiate the vendor contract and communicate the plans to internal and external stakeholders. You work with the vendor to transfer business processes, then manage risks and monitor performance against the contract.

This standard is for all managers and leaders.

Outsource business processes

Performance criteria*You must be able to:*

1. engage colleagues and other stakeholders in outsourcing decisions and managing outsourcing arrangements
2. analyse your organisation's core competences and identify business processes which are non-core
3. assess the potential benefits, costs, disadvantages, risks and legal and ethical implications of outsourcing non-core processes
4. produce business cases for outsourcing non-core processes
5. present business cases to decision-makers and confirm actions if they agree that outsourcing is worth pursuing
6. manage the human resource implications of outsourcing, including any redundancy, redeployment, training and development, and cultural issues
7. identify and evaluate potential vendors to outsource the processes to
8. develop a specification of your outsourcing requirements
9. invite potential vendors to tender for outsourced work
10. assess tenders received against the specifications
11. select the vendor which best meets your criteria
12. negotiate an outsourcing contract with the vendor which specifies the volume and level of service to be provided, payment terms
13. monitor the vendor's performance in partnership with work with legal specialists
14. communicate outsourcing plans, both internally and externally as required
15. monitor staff reactions to outsourcing plans and address their concerns
16. develop a plan to transfer the business processes to the vendor including contingency plans to manage risks
17. transfer the business processes to the vendor, addressing any emerging issues
18. monitor the vendor's ongoing performance in line with the contract, addressing any anomalies that occur
19. review the outsourcing arrangement at agreed points and in the event of significant changes in the operating environment
20. evaluate the business outsourcing processes to identify areas for improvement
21. follow the legal, organisational, codes of practice and policies relevant to outsourcing business processes

Outsource business processes

Knowledge and understanding

You need to know and understand: **General knowledge and understanding**

1. how to engage colleagues and stakeholders in outsourcing decisions and managing outsourcing arrangements
2. the difference between core and non-core business processes
3. how to assess the potential benefits, costs, disadvantages, risks, and legal and ethical implications of outsourcing non-core processes
4. how to make a business case for outsourcing non-core processes
5. the potential human resource implications of outsourcing, including redundancy, redeployment, training and development, and cultural issues, and how to address these
6. how to identify and evaluate potential vendors to which you could outsource the process, including the use of vendor rating systems
7. the importance of inviting potential vendors to tender against a specification of your requirements
8. how to assess and select the vendor which best meets your criteria
9. the techniques for negotiating and agreeing a legally binding outsourcing contract, and how to work with legal specialists
10. the importance of a legally binding outsourcing contract with a vendor specifying in detail the volume and level of service to be provided, payment terms and how the vendor's performance will be monitored
11. the importance of communicating the outsourcing plans internally and externally as required, and how to do so clearly and effectively
12. how to monitor a vendor's performance in line with the contract, promptly and effectively addressing any anomalies that occur
13. the importance of working closely with the vendor to transfer the business process to them, and how to do this
14. how to identify potential risks and emerging issues when transferring the business process and how to resolve them
15. the importance of reviewing the outsourcing arrangement at agreed points and in the event of significant changes in the business environment

Industry and sector specific knowledge and understanding

16. the industry and sector requirements for outsourcing business processes

Outsource business processes

17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out to outsource business processes

Context specific knowledge and understanding

18. the individuals in your area of work, their roles, responsibilities, competences and potential

19. your organisation's core and non-core business processes

20. your organisation's procedures and relevant legal requirements for inviting tenders to supply your requirements

Outsource business processes

Skills

1. Analysing
2. Assessing
3. Communicating
4. Decision-making
5. Evaluating
6. Monitoring
7. Negotiating
8. Persuading
9. Presenting information
10. Questioning
11. Reviewing
12. Risk management
13. Thinking strategically

Outsource business processes

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