



Property and Caretaking Management

National Occupational Standards

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**Consultation
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Contents

PS01	Assess requirements and plan service provision.....	3
PS02	Manage a budget.....	6
PS03	Co-ordinate provision of equipment for maintenance and caretaking operations	9
PS04	Co-ordinate provision of supplies for maintenance and caretaking operations	11
PS05	Monitor procedures to safely control work operations	14
PS06	Contribute to the safety, security and maintenance of the site	16
PS07	Provide leadership in your area of responsibility	18
PS08	Manage your own resources and professional development	21
PS09	Develop productive working relationships with colleagues.....	24
PS10	Support individuals to develop and maintain their performance	27
PS11	Help team members address problems affecting their performance	31
PS12	Provide learning opportunities for colleagues.....	34
PS13	Deal with problems, unexpected situations and emergencies.....	38
PS14	Develop customer relationships.....	40
PS15	Conduct a health and safety risk assessment of a workplace	42

PS01 Assess requirements and plan service provision

This unit is based on CISC units E112/E232/D212.

Elements

PS1.1 Inspect Site

PS1.2 Plan and schedule caretaking and maintenance service

PS1.3 Contribute to the development and implementation of quality management systems

Unit overview:

This Unit is concerned with the supervisor's ability to plan the caretaking service, schedule activities and establish a quality management system.

It involves the ability to carry out a thorough inspection of the property, assessing its compliance with required standards and making a record of those aspects which will affect the planning and provision of the caretaking service.

It will involve competence in the preparation of plans and schedules for the caretaking service and also estimating the resources required.

It also is concerned with their competence in implementing an effective quality management system.

PS1.1 Inspect site (Based on CISC E112.2)**Performance criteria:**

You must be able to do the following:

1. Establish the purpose of inspection and select appropriate methods for gathering and recording data
2. Confirm permission for access before commencement
3. Make sure observations and measurements necessary for the inspection are accurate and complete and recorded in agreed formats
4. Make sure requirements for additional information concerning the site are identified accurately and obtained
5. Where condition of site fails to satisfy statutory and organisational requirements, make sure problems are described clearly and notified to relevant parties
6. Where applicable make sure probable causes of damage, loss and deterioration are investigated and special areas of concern are highlighted and referred to relevant parties
7. Make sure records of inspection are clear, accurate and complete

Knowledge criteria:

You must know and understand the following:

- a. How to inspect property and take, record and format observations and measurements necessary to identify condition
- b. How to identify potential causes of damage, loss and deterioration
- c. How to identify and describe conditions which do not conform to organisational and statutory requirements
- d. Requirements and purposes for inspection
- e. The formats for observations and measurements
- f. Potential causes of damage, loss and deterioration
- g. Types of non conforming condition

PS1.2 Plan and schedule caretaking and maintenance service (Based on CISC E232.1)**Performance criteria:**

You must be able to do the following:

1. Make sure plans and schedules for caretaking and maintenance accommodate all relevant requirements, take account of past experience and enable objectives to be met efficiently within constraints applying
2. Make sure plans and schedules meet objectives for standards of customer care in accordance with organisational guidelines
3. Make sure plans and schedules clearly and accurately identify resource requirements
4. Prepare and present plans and schedules in accordance with approved formats and procedures
5. Periodically review and revise plans and schedules as appropriate, to maintain progress, overcome disruptions and achieve objectives

Knowledge criteria:

You must know and understand the following:

- a. Property caretaking and maintenance standards
- b. How to present and communicate information
- c. How to set objectives and problem solving techniques
- d. Principles and methods for formulating plans and schedules
- e. Standards of customer care relevant to the caretaking and maintenance service
- f. Resource availability and the constraints applying
- g. Organisational procedures
- h. Statutory regulations
- i. Customer requirements including the particular needs of those with special needs

- j. Contractual agreements
- k. Formats for plans and schedules
- l. How to plan, schedule and allocate resources effectively
- m. How to format and present plans and schedules
- n. How to conduct a review of service provision
- o. What constraints apply to caretaking and maintenance and why
- p. What are the relevant provisions of legal, health and safety and other regulatory requirements applying and why these are important
- q. What provision should be made in plans and schedules for customers with special needs
- r. What the uses and limitations are of different maintenance planning tools

PS1.3 Contribute to the development and implementation of quality management systems (Based on CISC E212.2)

Performance criteria:

You must be able to do the following:

1. Implement quality management systems in accordance with service agreements and organisational procedures
2. Make sure service provision and quality is checked regularly against agreed requirements and meets specified standards
3. Check methods of service provision and the use of equipment and materials regularly against agreed requirements and specified quality standards
4. Make sure work and service provision which fails to meet required service quality standards is identified and corrective action is implemented promptly and recorded

Knowledge criteria:

You must know and understand the following:

- a. How to establish quality management systems
- b. How to establish systems for checking quality
- c. Quality management systems
- d. Means of checking quality
- e. Service provision standards

PS02 Manage a budget

This unit is imported from the Management Standards Centre unit E1.

What is the unit about?

This unit is about having ownership of and being responsible for a budget for a defined area or activity of work. It initially involves preparing, submitting and agreeing a budget for a set operating period. It also involves monitoring actual performance against the agreed budget and taking necessary action in response to identified variances and any unforeseen developments.

Links with other units

Listed below are the main generic 'skills' which need to be applied in managing a budget. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Communicating
- Decision making
- Monitoring
- Acting assertively
- Presenting information
- Reporting
- Learning
- Negotiating
- Consulting
- Information management
- Evaluating
- Contingency planning
- Problem solving

Outcomes of effective performance

You must be able to do the following:

1. Evaluate available information and consult with others to prepare a realistic budget for the respective area or activity of work.
2. Submit the proposed budget to the relevant people in the organisation for approval and to assist the overall financial planning process.
3. Discuss and, if appropriate, negotiate the proposed budget with the relevant people in the organisation and agree the final budget.
4. Use the agreed budget to actively monitor and control performance for the respective area or activity of work.
5. Identify the causes of any significant variances between what was budgeted and what actually happened and take prompt corrective action, obtaining agreement from the relevant people if required
6. Propose revisions to the budget, if necessary, in response to variances and/or significant or unforeseen developments and discuss and agree the revisions with the relevant people in the organisation.
7. Provide ongoing information on performance against the budget to relevant people in your organisation.
8. Advise the relevant people as soon as possible if you have identified evidence of potentially fraudulent activities.
9. Gather information from implementation of the budget to assist in the preparation of future budgets.

Behaviours which underpin effective performance

1. You present information clearly, concisely, accurately and in ways that promote understanding.
2. You act within the limits of your authority.
3. You show integrity, fairness and consistency in decision-making.
4. You say no to unreasonable requests.
5. You use communication styles that are appropriate to different people and situations
6. You take and implement difficult and/or unpopular decisions, if necessary.
7. You respond quickly to crises and problems with a proposed course of action.

Knowledge and understanding

You need to know and understand the following:

General knowledge and understanding

1. The purposes of budgetary systems
2. Where to get and how to evaluate the available information in order to be able to prepare a realistic budget
3. The importance of spending time on and consulting with others in preparing a budget
4. How to discuss, negotiate and confirm a budget with people who control the finance and the key factors that should be covered
5. How to use a budget to actively monitor and control performance for a defined area or activity of work
6. The main causes of variances and how to identify them
7. What different types of corrective action which could be taken to address identified variances
8. How unforeseen developments can affect a budget and how to deal with them
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 other people
11. Types of fraudulent activities and how to identify them
12. The importance of using the implementation of the budget to identify information and lessons for the preparation of future budgets

Industry/sector specific knowledge and understanding

1. Factors, processes and trends that are likely to affect the setting of budgets in your industry/sector

Context specific knowledge and understanding

1. The area or activity for which the budget is for
2. The vision, objectives and operational plans for your area of responsibility
3. The budgeting period(s) used in your organisation
4. Organisational guidelines and procedures for the preparation and approval of budgets and for monitoring and reporting of performance against budgets and revising budgets
5. The agreed budget, how it can be used and how much it can be changed without approval
6. The limits of your authority
7. Who needs information in your organisation about performance against your budget, what information they need, when they need it and in what format
8. What to do and who to contact if you suspect fraud has been committed

PS03 Co-ordinate provision of equipment for maintenance and caretaking operations

This unit is based on CISC unit D133.

Elements

PS3.1 Requisition and plan the deployment of equipment and associated supplies on sites

PS3.2 Maintain equipment

Unit overview:

This unit is designed to assess the Property and Caretaking Supervisor's competence in obtaining, deploying and maintaining equipment for use in caretaking and routine maintenance in a safe, working condition.

**PS3.1 Requisition and plan the deployment of equipment and associated supplies on sites
(Based on CISC D133.1)****Performance criteria:**

You must be able to do the following:

1. Make sure sufficient equipment, tools and associated supplies of the appropriate types are requisitioned and deployed on sites to meet requirements
2. Make sure records of equipment use, servicing and use of associated supplies are established and maintained accurately
3. Establish contingency arrangements that allow for planned servicing of equipment, exceptional variances in the use of supplies and breakdowns or loss of tools and equipment
4. Clearly explain to users methods of operation, limitations of use and requirements for routine maintenance of equipment
5. Explain to users procedures and responsibilities for the safe use, care, routine maintenance and storage of equipment, tools and associated supplies in accordance with organisational and statutory requirements
6. Make sure appropriate training by a competent authority is provided for users where required to comply with legal, contractual and organisational requirements
7. Make sure hazards to users and other affected parties are assessed accurately, potential risks identified and appropriate procedures and safeguards which will minimise risk are specified and explained clearly
8. Ensure equipment, tools and associated supplies which are no longer fit for purpose or required are withdrawn promptly and dealt with in accordance with organisational procedures

Knowledge criteria: -

You must know and understand the following:

- a. How to establish and maintain a requisition, deployment and utilisation recording system
- b. How to establish contingency arrangements
- c. How to identify training needs
- d. How to assess hazards
- e. The types and uses of equipment and associated supplies
- f. The different types of recording systems
- g. The different types of hazard
- h. Safe working practices
- i. Organisational and statutory requirements
- j. The different sources of training

PS3.2 Maintain equipment (Based on CISC D133.2)**Performance criteria:**

You must be able to do the following:

1. Establish a programme of inspection, maintenance and testing which maximises the efficiency, safety and continued utilisation of equipment
2. Make sure regular checks are made to verify that maintenance and inspection is carried out in accordance with suppliers recommendations and organisational procedures
3. Report non-compliance with servicing and maintenance schedules promptly to decision makers
4. Replace unserviceable equipment and components promptly in accordance with organisational procedures
5. Make sure recurring problems in maintaining equipment in effective and safe operating condition are fully investigated, causes identified and appropriate and clear recommendations are made to decision makers

Knowledge criteria:

You must know and understand the following:

- a. How to establish and monitor programmes of maintenance, inspection and testing
- b. How to maintain the cost-effective operation of plant and equipment
- c. How to brief personnel
- d. How to investigate and report on persistent problems with equipment
- e. Suppliers', organisational and statutory requirements for maintenance, inspection and testing of plant and equipment
- f. The types of maintenance programme
- g. The types and sources of personnel for maintenance and inspection

PS04 Co-ordinate provision of supplies for maintenance and caretaking operations

This unit is based on CISC unit D131.

Elements

PS4.1 Monitor requirements for materials supply

PS4.2 Maintain material supplies to meet service requirements

PS4.3 Contribute to obtaining improvements in supplier performance

Unit overview:

This unit is designed to assess the Property and Caretaking Supervisor's competence in the efficient and effective co-ordination and control of the supply of materials to and on site. It is also concerned with their ability to assist in the improvement of supplier performance; including identifying alternative sources of supply.

PS4.1 Monitor requirements for materials supply (Based on CISC D131.1)**Performance criteria:**

You must be able to do the following:

1. Make sure supply requirements are assessed accurately from an analysis of actual and planned use and from user feedback
2. Identify realistic opportunities for reducing wastage and the cost of materials
3. Introduce systems for monitoring purchasing / requisitioning plans which enable variances in requirements to be accurately assessed
4. Identify predicted events which are likely to result in over or under supply and notify decision makers
5. Make sure stock records are monitored regularly and replenishment needs are calculated accurately
6. Remove out of date stock from use and dispose of safely in accordance with suppliers instructions, statutory requirements and organisational procedures
7. Make sure opportunities for improving stock control and usage are identified accurately and clearly and realistic recommendations on improvements are made available to interested parties

Knowledge criteria:

You must know and understand the following:

- a. How to calculate quantities
- b. How to calculate seasonal variations in demand
- c. How to analyse purchasing/requisitioning plans and user feedback
- d. How to identify and evaluate opportunities for cost savings, reducing wastage and improved stock control
- e. How to introduce systems for monitoring and control of stocks
- f. Sources of user feedback
- g. Measures for reducing wastage and for cost saving

- h. Systems for stock control
- i. Types of stock control record
- j. Types of variances
- k. How to dispose of out of date stock

PS4.2 Maintain material supplies to meet service requirements (based on CISC D131.2)

Performance criteria:

You must be able to do the following:

1. Make sure orders and requisitions for material supplies are complete and conform to the agreed purchasing plan
2. Make sure records of delivery are maintained accurately and the current delivery and stock position is assessed regularly and made available to appropriate decision makers
3. Monitor and record delays and variations in delivery, quantity and quality and investigate and report causes to decision makers
4. Where appropriate, provide decision makers with an accurate assessment of the action required to restore the supply position

Knowledge criteria:

You must know and understand the following:

- a. How to match orders for supplies to agreed purchasing plans
- b. How to calculate delivery and stock position
- c. How to maintain, monitor and record stock control system
- d. How to identify and investigate causes of variations and discrepancies
- e. How to assess action required to restore delivery position
- f. Types of purchasing / requisitioning plan and recording system
- g. Types of variations and discrepancies in delivery

PS4.3 Contribute to obtaining improvements in supplier performance (based on CISC D131.3)**Performance criteria:**

You must be able to do the following:

1. Assess supplier performance at regular intervals and make sure variances are identified accurately and communicated to and discussed with decision makers
2. Identify, discuss and agree with decision makers changes which are sufficient to improve supplier performance
3. Make sure suppliers are provided with advice and information which enables them to meet supply requirements and meet overall cost and quality requirements.
4. Conduct communications with suppliers in a manner which is designed to maximise and maintain goodwill and trust.

Knowledge criteria:

You must know and understand the following:

- a. How to evaluate supplier performance
- b. How to identify causes of variance
- c. How to identify improvements and changes
- d. The nature and type of variances

PS05 Monitor procedures to safely control work operations

This unit is imported from ENTO unit HSS3.

This unit is about making sure that statutory and workplace instructions are being carried out. It describes the competences required to make sure that:

- healthy and safe practices are being followed within work areas
- appropriate action is undertaken to control workplace hazards

Performance Criteria:

You must:

Check that health and safety instructions are followed:

1. keep up to date with health and safety regulations and workplace instructions, making sure that information is from reliable sources
2. conduct your monitoring of workplaces at agreed intervals and in accordance with workplace instructions
3. confirm that worker health and safety competence is up-to-date
4. confirm that the health and safety training needs of other people have been identified and met
5. effectively communicate workplace instructions to other people and obtain feedback from them
6. respond promptly to any breaches of health and safety instructions in a way which meets workplace and legal requirements
7. make recommendations for changes to workplace instructions to the responsible people
8. maintain records relating to health and safety matters that
 - comply with legal and workplace requirements, and
 - are accessible to those who are authorised to use them

Make sure that risks are controlled safely and effectively:

9. keep accurate and legible records of workplace risks identified or reported to you
10. report the existence of hazards in accordance with workplace health and safety instructions
11. confirm that appropriate precautions to control these risks have been agreed with the people responsible for health and safety
12. confirm that the precautions are in accordance with legal and workplace health and safety instructions
13. check that other people are aware of the risks and know the actions to be taken to minimise them
14. review the operational controls to make sure that workplace hazards are eliminated or controlled
15. report promptly and accurately any conflicts which still exist between workplace and legal requirements to the people responsible for health and safety

Knowledge and Understanding for this Unit:

You must know and understand:

- a. the employers' and employees' main legal responsibilities for health and safety in the workplace
- b. your responsibilities for health and safety as defined by any specific legislation covering your job role
- c. the scope of your job, your competency and capabilities
- d. the work areas and the people for whom you have responsibility
- e. the difference between a hazard and a risk
- f. the particular health and safety risks which may be present in your own job role and the precautions to take.
- g. why you should remain alert to the presence of hazards in the work place
- h. why you should promptly deal with or report hazards and risks in the workplace
- i. the specific health and safety arrangements covering your job role
- j. the health and safety instructions at your workplace
- k. how to keep health and safety records
- l. effective communication methods
- m. effective methods of monitoring other people's activities and communicating results
- n. agreed intervals for monitoring health and safety compliance
- o. hazard notices and alerts relevant to your work
- p. reliable sources of health and safety information

PS06 Contribute to the safety, security and maintenance of the site

This unit is based on CISC units E212/E232.

Elements

PS6.1 Monitor and control access, security and safety systems and procedures

PS6.2 Identify and resolve maintenance problems

Unit overview:

This unit is concerned with the Property and Caretaking Supervisors responsibility for safety, security and maintenance. This includes ensuring that building access, security and safety systems are maintained; that working conditions are satisfactory; and that building maintenance problems are dealt with satisfactorily.

PS6.1 Monitor and control access, security and safety systems and procedures (based on CISC E212.1)**Performance criteria:**

You must be able to do the following:

1. Make sure responsibilities regarding site access, security and safety systems and procedures are clarified and verified with decision makers
2. Make sure scheduled maintenance and testing of access, security and fire protection systems is monitored in accordance with statutory and organisational requirements and accurately recorded
3. Identify accurately and report promptly to interested parties in accordance with organisational policy, any failures and significant variances in specified performance of access, security and fire protection systems
4. Identify accurately and report promptly to interested parties any shortcomings and breaches of access, security and fire protection procedures with clear recommendations for improvements
5. Take appropriate emergency action in accordance with organisational procedures where people or property are at risk through a breakdown in access, security and fire protection systems or procedures

Knowledge criteria:

You must know and understand the following:

- a. How to monitor and report on access, security and fire safety systems, their planned maintenance and performance variances
- b. How to monitor and report on access, security and fire protection procedures and on breaches
- c. How to take emergency action
- d. The different types of access, security and fire protection systems
- e. The different types of access, security and fire protection procedures
- f. Planned maintenance of access, security and fire safety systems

- g. The appropriate emergency action to take where access, security and fire safety systems are not functioning

PS6.2 Identify and resolve maintenance problems (Based on CISC E232.4)

Performance criteria:

You must be able to do the following:

1. Introduce monitoring and reporting systems which provide prompt and accurate notification of maintenance problems
2. Accurately assess the nature, extent and causes of problems, with specialist help and advice sought where appropriate
3. Promptly identify options for dealing with the problem, explore strengths and weaknesses and recommend a course of action to decision maker(s)
4. Take appropriate and agreed action to resolve the problem efficiently and accurately assess its effectiveness
5. Make sure any hazards or inconvenience to those affected posed by the problem and its resolution are fully identified, assessed and appropriate action is taken
6. Relay instructions and information to others accurately, completely and clearly
7. Introduce contingency arrangements which deal effectively with situations where problem cannot be resolved quickly
8. Keep clear records of actions taken

Knowledge criteria:

You must know and understand the following:

- a. How to ensure effective communications
- b. How to analyse and assess problems and hazards
- c. How to develop contingency plans
- d. Organisational procedures and documentation
- e. Typical problems encountered, why they arise and how they have been resolved in the past
- f. Problem solving techniques and criteria suitable for assessing options
- g. Planning techniques and contingency management
- h. Evaluation and assessment processes
- i. Building systems and services / maintenance objectives and procedures/service documentation

PS07 Provide leadership in your area of responsibility

This unit is imported from the Management Standards Centre unit B6.

What is the unit about?

The unit is about providing direction to people in a clearly and formally defined area or part of an organisation and motivating and supporting them to achieve the vision and objectives for the area.

The 'area of responsibility' may be, for example, a branch or department or functional area or an operating site within an organisation.

Links to other units

This unit is linked to units **B1. Develop and implement operational plans for your area of responsibility**, **B5 Provide leadership for your team**, **B7. Provide leadership for your organisation** and **D6. Allocate and monitor the progress and quality of work in your area of responsibility** in the overall suite of National Occupational Standards for management and leadership.

Skills

Listed below are the main generic 'skills' which need to be applied in providing leadership in your area of responsibility. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Communicating
- Influencing and persuading
- Leading by example
- Motivating
- Consulting
- Planning
- Setting objectives
- Providing feedback
- Coaching
- Mentoring
- Valuing and supporting others
- Empowering
- Learning
- Following
- Managing conflict
- Obtaining feedback

Outcomes of effective performance

You must be able to do the following:

1. Create a vision of where your area is going and clearly and enthusiastically communicate it, together with supportive objectives and operational plans, to the people working within your area.
2. Ensure that people working within your area understand and can see how the vision, objectives and operational plans link to the vision and objectives of the overall organisation.
3. Steer your area successfully through difficulties and challenges, including conflict within the area.
4. Create and maintain a culture within your area which encourages and recognises creativity and innovation.
5. Develop a range of leadership styles and select and apply them to appropriate situations and people.
6. Communicate regularly, making effective use of a range of different communication methods, with all the people working within your area and show that you listen to what they say.
7. Give people in your area support and advice when they need it especially during periods of setback and change.
8. Motivate and support people in your area to achieve their work and development objectives and provide recognition when they are successful.
9. Empower people in your area to develop their own ways of working and take their own decisions within agreed boundaries.
10. Encourage people to give a lead in their own areas of expertise and show willingness to follow this lead.
11. Win, through your performance, the trust and support of people within your area for your leadership and get regular feedback on your performance.

Behaviours which underpin effective performance

1. You articulate a vision that generates excitement, enthusiasm and commitment.
2. You create a sense of common purpose.
3. You take personal responsibility for making things happen.
4. You make complex things simple for the benefit of others.
5. You encourage and support others to take decisions autonomously.
6. You act within the limits of your authority.
7. You make time available to support others.
8. You show integrity, fairness and consistency in decision-making.
9. You seek to understand people's needs and motivations.
10. You model behaviour that shows respect, helpfulness and co-operation.
11. You encourage and support others to make the best use of their abilities.

Knowledge and understanding

You need to know and understand the following:

General knowledge and understanding

1. The fundamental differences between management and leadership
2. How to create a compelling vision for an area of responsibility
3. How to select and successfully apply different methods for communicating with people across an area of responsibility
4. A range of different leadership styles and how to select and apply these to different situations and people
5. How to get and make use of feedback from people on your leadership performance
6. Types of difficulties and challenges that may arise, including conflict within the area, and ways of identifying and overcoming them
7. The benefits of and how to create and maintain a culture which encourages and recognises creativity and innovation
8. The importance of encouraging others to take the lead and ways in which this can be achieved
9. How to empower people effectively
10. How to select and successfully apply different methods for encouraging, motivating and supporting people and recognising achievement

Industry/sector specific knowledge and understanding

1. Leadership styles common in the industry/sector
2. Legal, regulatory and ethical requirements in the industry/sector

Context specific knowledge and understanding

1. Your own values, motivations and emotions
2. Your own strengths and limitations in the leadership role
3. The strengths, limitations and potential of people that you lead
4. Your own role, responsibilities and level of power
5. The vision and objectives of the overall organisation
6. The vision, objectives, culture and operational plans for your area of responsibility
7. Types of support and advice that people are likely to need and how to respond to these
8. Leadership styles used across the organisation

PS08 Manage your own resources and professional development

This unit is imported from the Management Standards Centre unit A2.

What is the unit about?

This unit is about managing your personal resources (particularly knowledge, understanding, skills, experience and time) and your professional development in order to achieve your work objectives and your career and personal goals.

You need to understand your work role and how it fits into the overall vision and objectives of the organisation whilst also understanding what is driving you in terms of your values and your career and wider personal aspirations.

Identifying and addressing gaps in your skills and knowledge and understanding is an essential aspect of this unit.

Links to other units

This unit is linked to units A1. Manage your own resources and A3. Develop your personal networks in the overall suite of National Occupational Standards for management and leadership.

If your organisation is a small firm, you should look at unit A3 *Check your own skills* which has been developed by the Small Firms Enterprise and Development Initiative (SFEDI) specifically for small firms and which may be more suitable to your needs. You can obtain information on the unit from SFEDI on tel. 0114 241 2155 or at the SFEDI website (www.sfedi.co.uk).

Skills

Listed below are the main generic 'skills' which need to be applied in managing your own resources and professional development. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Setting objectives
- Evaluating
- Planning
- Learning
- Reviewing
- Communicating
- Self-assessment
- Time management
- Stress management
- Obtaining feedback
- Reflecting
- Prioritising

Outcomes of effective performance

You must be able to do the following:

1. Evaluate, at appropriate intervals, the current and future requirements of your work-role taking account of the vision and objectives of your organisation.
2. Consider your values and your career and personal goals and identify information which is relevant to your work role and professional development.
3. Discuss and agree personal work objectives with those you report to and how you will measure progress.
4. Identify the learning styles which work best for you and ensure that you take these into account in identifying and undertaking development activities.
5. Identify any gaps between the current and future requirements of your work-role and your current knowledge, understanding and skills.
6. Discuss and agree, with those you report to, a development plan to address any identified gaps in your current knowledge, understanding and skills and support your own career and personal goals.
7. Undertake the activities identified in your development plan and evaluate their contribution to your performance.
8. Review and update your personal work objectives and development plan in the light of performance, any development activities undertaken and any wider changes.
9. Get regular and useful feedback on your performance from those who are in a good position to judge it and provide objective and valid feedback.
10. Ensure that your performance consistently meets or goes beyond agreed requirements.

Behaviours which underpin effective performance

1. You address multiple demands without losing focus or energy.
2. You recognise changes in circumstances promptly and adjust plans and activities accordingly.
3. You prioritise objectives and plan work to make best use of time and resources.
4. You take personal responsibility for making things happen.
5. You take pride in delivering high quality work.
6. You show an awareness of your own values, motivations and emotions.
7. You agree achievable objectives for yourself and give a consistent and reliable performance.
8. You recognise your own strengths and limitations, play to your strengths and use alternative strategies to minimise the impact of your limitations.
9. You make best use of available resources and proactively seek new sources of support when necessary.
10. You reflect regularly on your own experiences and use these to inform future action.

Knowledge and understanding

You need to know and understand the following:

General knowledge and understanding

1. The principles which underpin professional development
2. The importance of considering your values and career and personal goals and how to relate them to your job role and professional development
3. How to evaluate the current requirements of a work role and how the requirements may evolve in the future
4. How to set objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound)
5. How to identify development needs to address any identified gaps between the requirements of your work-role and your current knowledge, understanding and skills
6. What an effective development plan should contain and the length of time that it should cover.
7. The range of different learning style(s) and how to identify the style(s) which work(s) best for you
8. The type of development activities which can be undertaken to address identified gaps in your knowledge, understanding and skills
9. How to identify whether/how development activities have contributed to your performance
10. How to update work objectives and development plans in the light of performance, feedback received, any development activities undertaken and any wider changes
11. Monitoring the quality of your work and your progress against requirements and plans
12. How to evaluate your performance against the requirements of your work-role
13. How to identify and use good sources of feedback on your performance

Industry/Sector specific knowledge and understanding

1. Industry/sector requirements for the development or maintenance of knowledge, skills and understanding and continuing professional development

Context specific knowledge and understanding

1. The requirements of your work-role including the limits of your responsibilities
2. The vision and objectives of your organisation
3. Your own values and career and personal goals
4. Your personal work objectives
5. Your preferred learning style(s)
6. Your current knowledge, understanding and skills
7. Identified gaps in your current knowledge, understanding and skills
8. Your personal development plan
9. Available development opportunities and resources in your organisation
10. Your organisation's policy and procedures in terms of personal development
11. Reporting lines in your organisation
12. Possible sources of feedback in your organisation

PS09 Develop productive working relationships with colleagues

This unit is imported from the Management Standards Centre unit D1.

What is the unit about?

This unit is about developing working relationships with colleagues, within your own organisation and within other organisations, that are productive in terms of supporting and delivering your work and that of the overall organisation.

'Colleagues' are any people you are expected to work with, whether they are at a similar position or in other positions.

Links with other units

This unit is closely linked to unit D2. Develop productive working relationships with colleagues and stakeholders in the overall suite of National Occupational Standards for management and leadership.

Skills

Listed below are the main generic 'skills' which need to be applied in developing productive working relationships with colleagues. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Communicating
- Managing conflict
- Empathising
- Networking
- Information management
- Leading by example
- Valuing and supporting others
- Involving others
- Providing feedback
- Obtaining feedback
- Stress management
- Prioritising

Outcomes of effective performance

You must be able to do the following:

1. Establish working relationships with all colleagues who are relevant to the work being carried out.
2. Recognise, agree and respect the roles and responsibilities of colleagues.
3. Understand and take account of the priorities, expectations, and authority of colleagues in decisions and actions.
4. Fulfil agreements made with colleagues and let them know.
5. Advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements.
6. Identify and sort out conflicts of interest and disagreements with colleagues in ways that minimise damage to the work being carried out.
7. Exchange information and resources with colleagues to make sure that all parties can work effectively.
8. Provide feedback to colleagues on their performance and seek feedback from colleagues on your own performance in order to identify areas for improvement.

Behaviours which underpin effective performance

1. You present information clearly, concisely, accurately and in ways that promote understanding.
2. You seek to understand people's needs and motivations.
3. You make time available to support others.
4. You clearly agree what is expected of others and hold them to account.
5. You work to develop an atmosphere of professionalism and mutual support.
6. You model behaviour that shows respect, helpfulness and co-operation.
7. You keep promises and honour commitments.
8. You consider the impact of your own actions on others.
9. You say no to unreasonable requests.
10. You show respect for the views and actions of others.

Knowledge and understanding

You need to know and understand the following:

General knowledge and understanding

1. The benefits of developing productive working relationships with colleagues
2. Principles of effective communication and how to apply them in order to communicate effectively with colleagues
3. How to identify disagreements with colleagues and the techniques for sorting them out
4. How to identify conflicts of interest with colleagues and the measures that can be used to manage or remove them
5. How to take account of diversity issues when developing working relationships with colleagues
6. The importance of exchanging information and resources with colleagues
7. How to get and make use of feedback on your performance from colleagues
8. How to provide colleagues with useful feedback on their performance

Industry/sector specific knowledge and understanding

1. Regulations and codes of practice that apply in the industry or sector
2. Standards of behaviour and performance in the industry or sector
3. Working culture of the industry or sector

Context specific knowledge and understanding

1. Current and future work being carried out
2. Colleagues who are relevant to the work being carried out, their work roles and responsibilities
3. Processes within the organisation for making decisions
4. Line management responsibilities and relationships within the organisation
5. The organisation's values and culture
6. Power, influence and politics within the organisation
7. Standards of behaviour and performance expected in the organisation
8. Information and resources that different colleagues might need
9. Agreements with colleagues

PS10 Support individuals to develop and maintain their performance

This unit is imported from the Management Standards Centre unit D13.

Unit Summary**What is the unit about?**

This unit is about supporting individuals to develop and maintain their performance at work. These may be people in your own team or individuals from another work group to whom you are providing support.

This unit is based on a commonly-used coaching model where you and the individual clearly agree the improvements in performance required and plan a step-by-step process to achieve a desired standard. You will usually help the individual to develop new skills and experiment with alternative behaviours in a safe environment before applying these for real in the workplace. You will work with the individual to monitor their progress over time, providing specific feedback to help them progress, until they have achieved the desired standard or no longer need your support in developing and/or maintaining their progress.

Links to other units

This unit is linked to units D7. Provide learning opportunities for colleagues, D8. Help team members address problems affecting their performance and D9. Build and manage teams in the overall suite of National Occupational Standards for management and leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in supporting individuals to improve their performance. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Active listening
- Analysing
- Asking powerful questions
- Assessing
- Coaching
- Communicating
- Empathising
- Inspiring
- Learning
- Monitoring
- Motivating
- Planning
- Providing feedback
- Reviewing
- Risk management
- Self-assessment
- Setting objectives
- Valuing and supporting others

Outcomes of effective performance

You must be able to do the following:

1. Support the individual in identifying their particular needs, abilities and preferences and take these into account when planning and providing support.
2. Ensure that the support requirements of the individual are in line with the business objectives of the organisation.
3. Establish with the individual
 - the area(s) in which they want to develop their performance
 - the standard of performance they wish to achieve
 - why they want to develop their performance
 - the support they can expect from you, and the commitment you expect from them
 - the process by which you will support them.
4. Establish with the individual
 - the time scale of the process
 - the frequency and duration of meetings
 - points at which progress will be reviewed
 - how progress will be measured and assessed.
5. Explore with the individual the skills they need to develop and the behaviours they need to change in order to meet the desired standard of performance.
6. Explore with the individual obstacles which could hinder their progress and how to remove these obstacles.
7. Plan with the individual how they can develop new skills and behaviours in a logical step-by-step sequence.
8. Provide opportunities for the individual to develop new skills and experiment with alternative behaviours in a safe environment.
9. Encourage the individual to identify and seize opportunities to apply their newly-developed skills and behaviours to their work.
10. Explore with the individual any risks involved in applying their newly-developed skills and behaviours to their work and help them plan how to reduce these risks to levels which are acceptable to them and the organisation.
11. Encourage the individual to reflect on their progress and articulate their thoughts and feelings about it.
12. Monitor the individual's progress and provide specific feedback designed to improve their skills, reinforce effective behaviours and enhance their motivation to achieve the desired standard of performance.
13. Use alternative approaches or enlist the support of colleagues and/or specialists, if the individual is not making satisfactory progress.
14. Agree with the individual when they have achieved the desired standard of performance, or when they no longer require your support.

15. Encourage and empower individuals to take responsibility for developing and maintaining their own self-awareness, performance and impact.

Behaviours which underpin effective performance

1. You constantly seek to develop performance.
2. You find practical ways to overcome barriers.
3. You keep people informed of plans and developments.
4. You make time available to support others.
5. You encourage and support others to make best use of their abilities.
6. You give feedback to others to help them develop their performance.
7. You recognise the achievements and the success of others.
8. You inspire others with the excitement of learning.
9. You confront performance issues and resolve them directly with the people involved.
10. You identify clearly the value and benefits to people of a proposed course of action.

Knowledge and Understanding

You need to know and understand the following:

General knowledge and understanding

1. How to identify the particular needs, abilities and preferences of individuals and to take these into account when planning and providing support.
2. The principles, methods, tools and techniques involved in planning and providing support to individuals to improve their performance.
3. Principles, methods, tools and techniques for assessing an individual's performance.
4. The importance of establishing with individuals the course of action, the areas of performance to be targeted and the standard of performance they want to achieve.
5. Principles, methods, tools and techniques for assessing an individual's knowledge, skills and personal qualities, identifying learning needs, and the importance of exploring these with the individual.
6. How to identify obstacles which could hinder an individual's progress and the importance of removing these obstacles.
7. Learning and development opportunities for the individual to develop new skills and experiment with alternative behaviours in a safe environment.
8. The importance of encouraging individuals to identify and seize opportunities to apply their newly-developed skills and behaviours to their work.
9. How to identify risks involved in the application of newly-developed skills and behaviours to the individual's work and how to reduce these risks to levels which are acceptable to them and the organisation.
10. The principles, methods, tools and techniques involved in monitoring individuals' progress of developing their performance.

11. The principles, methods, tools and techniques involved in providing specific feedback to improve their skills, reinforce effective behaviours and enhance their motivation to achieve the desired standard of performance.
12. Alternative approaches and how to make use of these if the individual is not making satisfactory progress.
13. The importance of agreeing with the individual when they have achieved the desired standard of performance, or when they no longer require your support.

Industry/sector specific knowledge and understanding

1. Industry/sector requirements for supporting individuals to improve their performance.

Context specific knowledge and understanding

1. Individual's needs, abilities and preferences.
2. Possible obstacles, either organisational or individual related, which could hinder the individual's progress.
3. Risks to individuals when applying their newly-developed skills and behaviours to their work.
4. Sources of advice, guidance and support from colleagues and/or specialists.

PS11 Help team members address problems affecting their performance

This unit is imported from the Management Standards Centre unit D8.

What is the unit about?

This unit is about helping members of your team address problems affecting their performance. These may be work-related problems or problems arising from their personal circumstances.

The unit involves identifying problems affecting people's performance and discussing these in a timely way with the team members concerned to help them find a suitable solution to their problem.

Sometimes you may need to refer the team member to specialist support services.

Who is the unit for?

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

Links with other units

This unit is linked to units B8. Ensure compliance with legal, regulatory, ethical and social requirements, D5. Allocate and check work in your team and D6. Allocate and monitor the progress and quality of work in your area of responsibility in the overall suite of National Occupational Standards for management and leadership.

Skills

Listed below are the main generic 'skills' which need to be applied in helping team members address problems affecting their performance. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Acting assertively
- Communicating
- Consulting
- Decision-making
- Empathising
- Information management
- Managing conflict
- Monitoring
- Problem solving
- Providing feedback
- Reviewing
- Setting objectives
- Team building
- Valuing and supporting others

Outcomes of effective performance

You must be able to do the following:

1. Give team members opportunities to approach you with problems affecting their performance.
2. Identify performance issues and bring these promptly to the attention of the team members concerned.
3. Discuss problems with team members at a time and place appropriate to the type, seriousness and complexity of the problem.
4. Gather and check information to accurately identify the problem and its cause.
5. Discuss the range of alternative courses of action and agree with the team member a timely and effective way of dealing with the problem.
6. Refer the team member to support services or specialists, where necessary.
7. Keep a confidential record of your discussions with team members about problems affecting their performance.
8. Ensure your actions are in line with your organisation's policies for managing people.

Behaviours which underpin effective performance

1. You find practical ways to overcome barriers.
2. You show empathy with others' needs, feelings and motivations and take an active interest in their concerns.
3. You make time available to support others.
4. You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes.
5. You show integrity, fairness and consistency in decision-making.
6. You confront performance issues and resolve them directly with the people involved.
7. You keep confidential information secure.
8. You check the validity and reliability of information.
9. You identify the implications or consequences of a situation.
10. You take timely decisions that are realistic for the situation.

Knowledge and understanding

You need to know and understand the following:

General knowledge and understanding

1. The importance in giving team members opportunities to approach you with problems affecting their performance.
2. How to encourage team members to approach you with problems affecting their performance.
3. The importance of identifying performance issues and bringing these promptly to the attention of the team members concerned.
4. The importance of discussing problems with team members at a time and place appropriate to the type, seriousness and complexity of the problem.
5. How to gather and check the information you need to identify the problem and its cause.
6. The importance of identifying the problem accurately.
7. The range of alternative courses of action to deal with the problem.
8. The importance of discussing and agreeing with the team member a timely and effective way of dealing with the problem.
9. When to refer the team member to support services or specialists.
10. The importance of keeping a confidential record of your discussions with team members about problems affecting their performance, and how to do so.
11. The importance of ensuring your actions are in line with your organisation's policies for managing people and their performance

Industry/sector specific knowledge and understanding

1. Industry/sector requirements for helping team members address problems affecting their performance.

Context specific knowledge and understanding

1. The types of problems that your team members may encounter which can affect their performance.
2. Your role, responsibilities and limits of authority when dealing with team members' problems.
3. The range of support services or specialists that exist inside and outside your organisation.
4. Your organisation's policies for managing people and their performance

PS12 Provide learning opportunities for colleagues

This unit is imported from the Management Standards Centre unit D7.

What is the unit about?

This unit is about supporting colleagues in identifying their learning needs and helping to provide opportunities to address these needs.

Encouraging colleagues to take responsibility for their own learning is an aspect of this unit as is your role in providing an 'environment', for example, in your team or area of responsibility, in which learning is valued.

For the purposes of this unit, 'colleagues' means those people for whom you have line management responsibility.

Links with other units

This unit is linked to units D3. Recruit, select and keep colleagues, D5. Allocate and check work in your team and D6. Allocate and monitor the progress and quality of work in your area of responsibility in the overall suite of National Occupational Standards for management and leadership.

If your organisation is a small firm, you should look at unit K1 Make sure your staff can do their work which has been developed by the Small Firms Enterprise and Development Initiative (SFEDI) specifically for small firms and which may be more suitable to your needs. You can obtain information on the unit from SFEDI on tel. 0114 241 2155 or at the SFEDI website (www.sfedi.co.uk).

Skills

Listed below are the main generic 'skills' which need to be applied in providing learning opportunities for colleagues. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Coaching
- Demonstrating
- Providing feedback
- Mentoring
- Motivating
- Setting objectives
- Prioritising
- Planning
- Empowering
- Reviewing
- Leadership
- Valuing and supporting others
- Information management
- Communicating

Outcomes of effective performance

You must be able to do the following:

1. Promote the benefits of learning to colleagues and make sure that their willingness and efforts to learn are recognised.
2. Give colleagues fair, regular and useful feedback on their work performance, discussing and agreeing how they can improve.
3. Work with colleagues to identify and prioritise learning needs based on any gaps between the requirements of their work-roles and their current knowledge, understanding and skills.
4. Help colleagues to identify the learning style(s) or combination of styles which works best for them and ensure that these are taken into account in identifying and undertaking learning activities.
5. Work with colleagues to identify and obtain information on a range of possible learning activities to address identified learning needs.
6. Discuss and agree, with each colleague, a development plan which includes learning activities to be undertaken, the learning objectives to be achieved, the required resources and timescales.
7. Work with colleagues to recognise and make use of un-planned learning opportunities.
8. Seek and make use of specialist expertise in relation to identifying and providing learning for colleagues.
9. Support colleagues in undertaking learning activities making sure any required resources are made available and making efforts to remove any obstacles to learning.
10. Evaluate, in discussion with each colleague, whether the learning activities they have undertaken have achieved the desired outcomes and provide positive feedback on the learning experience.
11. Work with colleagues to update their development plan in the light of performance, any learning activities undertaken and any wider changes.
12. Encourage colleagues to take responsibility for their own learning, including practising and reflecting on what they have learned.

Behaviours which underpin effective performance

1. You recognise the opportunities presented by the diversity of people.
2. You find practical ways to overcome barriers.
3. You make time available to support others.
4. You seek to understand individuals' needs, feelings and motivations and take an active interest in their concerns.
5. You encourage and support others to make the best use of their abilities.
6. You recognise the achievements and the success of others.
7. You inspire others with the excitement of learning.
8. You confront performance issues and sort them out directly with the people involved.
9. You say no to unreasonable requests.
10. You show integrity, fairness and consistency in decision making.

Knowledge and understanding

You need to know and understand the following:

General knowledge and understanding

1. The benefits of learning for individuals and organisations and how to promote these to colleagues
2. Ways in which you can develop an 'environment' in which learning is valued and willingness and efforts to learn are recognised
3. Why it is important to encourage colleagues to take responsibility for their own learning
4. How to provide fair, regular and useful feedback to colleagues on their work performance
5. How to identify learning needs based on identified gaps between the requirements of colleagues' work-roles and their current knowledge, understanding and skills
6. How to prioritise learning needs of colleagues, including taking account of organisational needs and priorities and the personal and career development needs of colleagues
7. The range of different learning styles and how to support colleagues in identifying the particular learning style(s) or combination of learning styles which works best for them
8. Different types of learning activities, their advantages and disadvantages and the required resources (for example, time, fees, substitute staff)
9. How/where to identify and obtain information on different learning activities
10. Why it is important for colleagues to have a written 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)
11. How to set learning objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-Bound)
12. Sources of specialist expertise in relation to identifying and providing learning for colleagues
13. What type of support colleagues might need to undertake learning activities, the resources needed and the types of obstacles they may face and how they can be resolved
14. How to evaluate whether a learning activity has achieved the desired learning objectives
15. The importance of regularly reviewing and updating written development plans in the light of performance, any learning activities undertaken and any wider changes
16. How to take account of equality legislation, any relevant codes of practice and general diversity issues in providing learning opportunities for colleagues

Industry/sector specific knowledge and understanding

1. Industry/sector requirements for the development or maintenance of knowledge, skills and understanding and professional development
2. Learning issues and specific initiatives and arrangements that apply within the industry/sector
3. Working culture and practices of the industry/sector

Context specific knowledge and understanding

1. Relevant information on the purpose, objectives and plans of your team or area of responsibility or the wider organisation
2. The work roles of colleagues, including the limits of their responsibilities and their personal work objectives
3. The current knowledge, understanding and skills of colleagues
4. Identified gaps in the knowledge, understanding and skills of colleagues
5. Identified learning needs of colleagues
6. Learning style(s) or combinations of styles preferred by colleagues
7. The written development plans of colleagues
8. Sources of specialist expertise available in/to your organisation in relation to identifying and providing learning for colleagues
9. Learning activities and resources available in/to your organisation
10. Your organisation's policies in relation to equality and diversity
11. Your organisation's policies and procedures in relation to learning
12. Your organisation's performance appraisal systems

PS13 Deal with problems, unexpected situations and emergencies**Unit Overview**

This unit is about making judgements and dealing with the unexpected at work. It is about recognising when you need to step in to help resolve a problem, situation or emergency and then taking the appropriate action to resolve it. It is also about knowing when you need to escalate and how to do so.

You should be able to recognise and understand the difference between an emergency and an inconvenience, and your organisation's procedures for dealing with both of these situations. This includes knowing when you are able to deal with and resolve a problem yourself and knowing when you need to report it to management and/or the relevant emergency services.

When your intervention is required you should be able to identify and discuss problems with those involved and gather relevant information before making an informed judgement on the appropriate course of action.

Performance Criteria

You must be able to do the following:

1. Recognise when problems with other staff, customers or the public require your intervention
2. Discuss the facts of the problem with those involved to ensure you have a clear understanding
3. Carry out an accurate assessment of the situation
4. Select a course of action appropriate for those involved and within the limits of your competence and authority
5. Escalate problems to senior management where they are outside the limits of your authority
6. Ensure your response is proportional to the severity of the situation
7. Liaise with colleagues and/ or emergency services and other relevant individuals or organisations to resolve the situation
8. Where appropriate, provide assistance to emergency services, as required and appropriate to the situation
9. Take appropriate action to ensure that, following problems and emergencies, premises are made safe for customers' use
10. Where appropriate, ensure that the premises are able to be secured following resolution of the incident
11. Complete all necessary reporting requirements accurately and fully

Knowledge Criteria

You must know and understand the following:

- a. The procedures for dealing with problems and when you are required to do so
- b. The limits of your authority when dealing with problems and the procedures for escalation
- c. How to discuss the details of a problem in a clear, respectful and non-confrontational way with those involved
- d. The importance of remaining calm when dealing with problems and emergency situations
- e. How to use detailed information to inform and offer appropriate solutions to resolve problems
- f. The different types of problems caused by environmental factors and how to identify them
- g. How to carry out an accurate assessment of the problem and the factors to take into consideration
- h. Different types of remedial action and how to select the appropriate one for the problem
- i. The limits of your responsibility, authority and competence when responding to problems and emergencies
- j. The appropriate person/s to report to when you cannot deal with a problem yourself
- k. How to recognise and emergency
- l. Your organisation's procedures for dealing with an emergency
- m. The role of different emergency services and how to contact them
- n. The information that emergency services require in order to respond effectively
- o. The procedures for reinstating and securing premises following problems and emergencies
- p. How to accurately record and report the details of an emergency

PS14 Develop customer relationships

This unit is imported from the Institute of Customer Service unit CS36.

This Unit sits within the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

What this unit is about

When you deal with your customer regularly, you want to make each encounter a good customer experience. The impression you create and the way the service is delivered affects this in just the same way as when you deal with a customer only once.

However, a longer-term relationship with a repeat customer also depends on building up your customer's confidence in the service you offer. Loyalty and a long-term relationship rely on your customer having a realistic view of your organisation's service and being comfortable with it.

Your customer will return to your organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with you before.

Customer service standards

To develop customer relationships you must consistently:

14.1 Build your customer's confidence that the service you give will be excellent

1. show that you know and understand your organisation's services or products
2. allocate the time you take to deal with your customer according to organisational guidelines
3. reassure your customer that you are doing everything possible to keep the promises made by your organisation

14.2 Meet the expectations of your customers

1. recognise when there may be a conflict between your customer's expectations and your organisation's service offer
2. balance your customer's expectations with your organisation's service offer by offering an alternative or explaining the limits of the service offer
3. work effectively with others to resolve any difficulties in meeting your customer's expectations

14.3 Develop the long-term relationship between your customer and your organisation

1. give additional help and information to your customer in response to their questions and comments about your organisation's services or products
2. discuss expectations with your customer and explain how these compare with your organisation's services or products
3. advise others of feedback received from your customer

4. identify new ways of helping your customers based on the feedback they have given you
5. identify extra added-value that your organisation could offer to long-term customers

Knowledge and understanding

To be competent at developing customer relationships you need to know and understand:

- a. the importance of customer retention
- b. how your own behaviour affects the behaviour of the customer
- c. how to behave assertively and professionally at all times
- d. how to defuse potentially stressful situations
- e. the limitations of the service offer
- f. how customer expectations may change as they deal with your organisation
- g. the cost and resource implications of an extension of the service offer to meet or exceed customer expectations
- h. the cost implications of bringing in new customers as opposed to retaining existing customers
- i. who to refer to when considering any variation to the service offer

Key words and phrases for this unit

- retaining customers
- customer confidence
- allocate time
- reassure customers
- meet expectations
- balance expectations
- work with others
- give additional help
- long-term relationships
- advise others
- gather feedback

PS15 Conduct a health and safety risk assessment of a workplace

This unit is imported from ENTO unit HSS6.

This unit is about the competences needed to identify hazards in the workplace, to make recommendations to control the risk and to review the results.

Performance Criteria:

You must:

Identify hazards in the workplace

1. clearly define why and where the risk assessment will be carried out
2. confirm that all the information available to you on statutory health and safety regulations is up-to-date and from reliable sources
3. recognise your own limitations and seek expert advice and guidance on operational controls when appropriate
4. select a method for identifying hazards appropriate to the workplace being assessed
5. make sure your investigation fully identifies those areas in the workplace where hazards with a potential for serious harm to health and safety are most likely to occur
6. identify hazards which could result in serious harm to people at work or other people
7. record hazards in a way which meets legal, good practice and workplace requirements
8. report the results of the process to the responsible people in an agreed format and timescale

Assess the workplace and recommend control measures

9. review all legal requirements that are appropriate to your workplace and working practices to make sure effective control measures are in place
10. confirm that industry standards and all other reasonable precautions are in place
11. identify hazards that could be eliminated
12. for hazards that cannot be eliminated identify the measures needed to control them to make sure the people carrying out the work will not be harmed
13. assess the level of risk and consider how the risks can be controlled to minimise harm
14. list unacceptable risks in priority order including all breaches of relevant health and safety legislation and workplace instructions
15. prepare a risk assessment report containing recommendations for minimising risks
16. present the results of the risk assessment to the responsible people in the agreed format and timescale

Review your workplace assessment of risks

17. compare the latest risk assessment to the current workplace and working practices
18. accurately identify any significant differences between previous and new working practices
19. investigate the action taken as a result of your recommendations
20. accurately identify new hazards arising from changes in the workplace or working practices
21. make changes to your risk assessment in line with the review
22. promptly inform everyone affected by the changes

Knowledge and Understanding for this Unit:

You must know and understand:

- a. the responsibilities for risk assessments as required by current legislation
- b. your legal responsibilities for health and safety in the workplace as required by the current legislation
- c. your responsibilities for health and safety as defined by any specific legislation covering your job role
- d. the workplace hazards that are most likely to cause harm to health and safety
- e. the importance of remaining alert to the presence of hazards in the work place
- f. methods of identifying hazards, including direct observation, examining records, or interviews
- g. the purpose, legal implications and importance of carrying out risk assessments
- h. procedures for carrying out a risk assessment
- i. the particular health and safety risks which may affect your own job role and the precautions to be taken
- j. the resources required for a risk assessment to take place
- k. information sources for risk assessments (e.g. HSE publications)
- l. what to do with the results of the risk assessment
- m. the importance of dealing with, or promptly reporting, risks
- n. your own limitations, job responsibilities and capabilities
- o. where to find expert advice and guidance
- p. the work areas and people for whom you are carrying out the assessment
- q. work activities of the people in the workplace where you are carrying out the risk assessment
- r. effective communication methods