

## Overview

This standard is about preparing and monitoring operational plans and procedures. The standard covers the organisational policies and procedures and legal requirements including respecting diversity and protecting security and confidentiality. It includes identifying risks and contingencies, making sure that the best use is made of resources and that actions are co-ordinated in line with the plan. It is for administrators who have responsibility for the preparation, co-ordination and monitoring of operational plans and work procedures.

It is for professionals in business administration roles who prepare and coordinate operational plans and procedures.

## Performance criteria

### *You must be able to:*

1. develop plans to coordinate relevant operations to achieve identified outcomes
2. specify the actions to ensure the required resources are available for achieving the agreed outcomes
3. define a schedule for achieving outcomes in accordance with specific, measurable, achievable, realistic and time-bound (SMART) objectives to aid monitoring
4. ensure plans are in accordance with organisational priorities, objectives and constraints
5. share the plan with all relevant stakeholders and get their approval
6. identify risks and develop contingencies to ensure the outcomes are achieved
7. monitor and update plans regularly to reflect changes to the outcomes or objectives
8. check that relevant members of staff understand their roles and responsibilities within the operational plans
9. coordinate the activities to deliver operational plans
10. communicate changes in plans which affect work methods and activities where these are required
11. agree corrective actions if operations are not in accordance with plans
12. keep all records secure in accordance with organisational policies, procedures, legal and data protection requirements

## Knowledge and understanding

### *You need to know and understand:*

1. the limits of your authority when preparing and coordinating operational plans
2. the members of staff to be involved in the development of operational plans
3. the organisation's relevant priorities, objectives and constraints
4. how to identify risks and contingencies when planning operations
5. the purpose of setting specific, measurable, achievable, realistic and time-bound (SMART) objectives and how to do so
6. the benefits of clear communication when planning and coordinating operations
7. the legal and regulatory requirements in relation to operational plans
8. the range of planning techniques and tools
9. how to identify and prioritise outcomes for operational plans
10. how to identify the actions, resources and those responsible to achieve the agreed outcomes of operational plans
11. how to monitor the plan against the agreed outcomes and objectives
12. the benefits of continuously seeking opportunities for improvement
13. the purpose of maintaining security and confidentiality
14. the organisational policies, procedures, legal and data protection requirements in relation to security and confidentiality of information

## Skills

1. communicating
2. interpersonal skills
3. reading
4. team working

INSBA007



Prepare and coordinate operational plans and procedures

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