

## Overview

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

This standard involves engaging with stakeholders, reviewing past developments and identifying factors likely to affect future expenditure.

Users of this standard will need to communicate effectively to meet individuals' needs and wishes and work in line with health and safety legislation, policy and practices.

## Performance criteria

### *You must be able to:*

- P1. identify and agree the roles and responsibilities of yourself and others in making recommendations for the use of physical resources
- P2. provide opportunities for relevant stakeholders to make suggestions for future expenditure
- P3. ensure your proposals take account of past experience, trends and developments
- P4. make proposals and recommendations based on an accurate interpretation of valid data and a realistic evaluation of risk
- P5. identify other factors likely to affect future expenditure
- P6. clearly and concisely state the expected benefits, the costs involved and any potential negative consequences
- P7. consider alternative options for expenditure and provide valid reasons why you have included or rejected them
- P8. provide sufficient, valid information for relevant people to make a decision on your proposals
- P9. provide a financial justification and sufficient, valid information to allow your proposals to be evaluated
- P10. comply with required timescales and format for delivery of the proposal where relevant
- P11. present proposals to relevant stakeholders in an appropriate format and at an appropriate time
- P12. negotiate proposals in a way which maintains good relationships with the people involved
- P13. clarify and resolve any areas of uncertainty and disagreement over the proposals
- P14. complete negotiations within agreed timescales
- P15. provide relevant stakeholders with accurate information on decisions in a manner and at a time, which is likely to ensure their co-operation and confidence
- P16. complete all relevant documentation required for making recommendations for the use of physical resources

## Knowledge and understanding

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

- K1. how to access and interpret all relevant work instructions, legislation, guidelines, policies, procedures and protocols needed to make recommendations for the use of physical resources
- K2. the scope and limitations of your own competence, responsibilities and accountability as it applies to your job role
- K3. specific procedures for reporting issues which are beyond your competence, responsibilities and accountability
- K4. the physical resources needed to carry out activities effectively
- K5. how to carry out cost-benefit analyses with regard to proposed expenditure
- K6. how to identify and evaluate alternative options to proposals on expenditure
- K7. how to develop and argue an effective case for expenditure
- K8. the trends and developments which may influence future expenditure and how to forecast and plan for these
- K9. the procedures which need to be followed to make recommendations for expenditure
- K10. the importance of effective budgetary control to team and organisational efficiency, and your role and responsibilities in relation to this
- K11. the principles and methods which underpin effective budgetary control
- K12. the importance of keeping accurate records of past expenditure
- K13. the information needed to make decisions on expenditure and how to gather and check the validity of this information
- K14. how to decide on targets, standards and monitoring methods
- K15. how to collect and validate information required to evaluate a case for expenditure
  
- K16. the organisational objectives and strategies relevant to the programmes of work
- K17. the importance of gaining agreement to budgets
- K18. how to carry out budget negotiations
- K19. areas of uncertainty and disagreement which may occur when agreeing budgets and how to resolve these in a way which is satisfactory to those involved in the decision-making process
- K20. how to complete and safely store all relevant documentation in accordance with organisational requirements

Make recommendations for the use of physical resources

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**Developed by** Skills for Health

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**Suite** General Healthcare

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