

**Development
Workers**
National
Occupational
Standards





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Introduction

Welcome to the National Occupational Standards for development workers. Development work takes place through a support agency and provides information, advice, training, guidance and help to groups and communities.

Development workers support organisations to improve the quality and sustainability of the services or products that they offer and enable them establish and deliver their mission. These standards are appropriate for those working in any sector where this work is carried out.

This introduction covers who these standards are for, why and how you should use them, and an explanation of their structure.

There has long been a need for all people engaged in the critical area of 'development' to identify the roles they perform and the skill sets they make use of. The UK Workforce Hub was the first organisation to map, identify and develop National Occupational Standards for development workers, and this work is now being taken forward by Skills - Third Sector.

A development worker based in a support agency, for example, a local infrastructure organisation, who is providing support to groups and communities, often needs many skills to do their job effectively. The group of practitioners who have developed these National Occupational Standards have given serious consideration to defining not only the skills that every competent development worker needs, but also what they need to know to carry out those skills. Development work has begun to develop a sense of pride in its own identity and to be clearer about best practice and the thinking that underlies it. We should continue to build on this base and to learn both from those at the forefront of our profession and the very best of theory and research. The National Occupational Standards for development workers will allow us to do exactly that.

What do we mean by development worker?

A development worker works for a support agency and develops and supports groups and communities in their local area.

Development workers do a wide range of job roles in very different organisations, in both the third and public sectors. Typical job titles include business support and training officer, development worker, workforce development officer, regional development officer, trustee and network officer, employment advisor, information officer, funding advice worker, legal advisor, small groups worker, or outreach worker.

Development workers provide services to groups and communities to:

- Improve and strengthen the services community groups and voluntary organisations provide to benefit their users
- Work, learn and develop together
- Support the voluntary sector to be independent and to represent their needs locally, regionally and nationally.
- Support a group so that it can run and sustain its own activities

Work that development workers might do with groups and communities may include:

- Identifying their needs, rights, opportunities and responsibility
- Planning, organising and taking action
- Evaluating the effectiveness and impact of action

The development worker needs to operate effectively within a framework of ethics, values and confidentiality, both their own and those of the organisation(s) they work with. All their work challenges oppression, tackles inequalities and supports sustainability.

The development worker needs to know about and adhere to the legislative requirements and areas of compliance that are required in the places and contexts they work in.

The development worker needs to be aware of and appreciate their own limits and must deliver a mixture of information, advice, training, guidance or support based on their own knowledge and understanding.

Key values that underpin development practitioners and their work

Development work should both recognise and value voluntary activity as a part of a democratic society. Practitioners need to allow for and distinguish between the different needs and abilities of community groups and voluntary organisations. This recognition should ensure that all people are treated as individuals with dignity and respect.

Development workers operate with compassion and respect for individuals; with integrity; valuing diversity; with a commitment to the independence of the sector and with an appreciation of the contribution the sector makes to the lives of individuals and communities.

Development work must also value other experts in the field as a check and balance for the skills and knowledge of existing practitioners. Practitioners also need to make sure that their work is inclusive by being aware of, and making allowances for, the fact that people have different accessibility needs, including to information and resources.

Who are these National Occupational Standards for?

The standards are designed to be used by everyone, whether they are a paid development worker or a volunteer, working for a local support organisation or a specialist national organisation, or working in the public or third sector. They have been assembled to give every development worker access to a resource that will help them to perform better in their role and enhance the quality of service they provide to organisations.

These standards are for you if you are a development worker or if you manage a development worker - whether it is the focus of your working remit or just a small part of it. It may be a role you perform as a volunteer or as part of your paid work. Whatever the circumstances, you should find these standards relevant.

The range of people with development work responsibilities is great but examples of those who would find the standards useful include:

- chief executive
- development officer
- project manager
- community development officer

Why should you use them?

For organisations and employers standards can help with:

- Strategic planning
- Identifying and planning personnel requirements
- Developing job descriptions and person specifications
- Supporting recruitment and selection procedures
- Designing, delivering and evaluating training
- Providing coaching and mentoring support to individuals
- Delegating responsibility to staff
- Monitoring performance
- Using nationally agreed criteria to carry out performance reviews fairly and consistently
- Developing and retaining a skilled, motivated, confident and flexible workforce
- Meeting the indicators for external accreditation, e.g. Investors in People
- Aligning individual and team targets to organisational goals
- Supporting partnerships by using common standards of performance and quality
- Demonstrating the organisation's competence when tendering or applying for funding
- Supporting accreditation

For individuals:

- Developing self confidence and personal effectiveness
- Tracking their skills against national standards
- Ensuring best practice at work
- Complying with statutory requirements
- Receiving constructive and objective feedback from managers
- Opening up a wider range of career opportunities
- Transferring competence to other work
- A route to nationally recognised qualifications

National Occupational Standards of competence are used widely by employers and individuals and are the building blocks of a wide range of development tools and qualifications. They are generally available and accessible and are kept 'fit for purpose' by consulting with people who do the job 'on the ground' - the practitioners.

How can you use them?

National Occupational Standards, because they are based around skills and competency, can be used in a wide range of ways by both individuals and organisations. The precise way people use them vary but, in general, the main ways they are used are:

Recruitment and selection:

- Designing and implementing objective and ethical procedures for recruitment and selection
- Preparing recruitment specifications and job advertisements
- Designing interview checklists and questions, information sheets for referees and advance information for prospective job candidates

Job design and evaluation:

- Designing and monitoring job roles and responsibilities
- Developing and updating job descriptions and person specifications
- Designing criteria for evaluating job roles, grading staff and implementing payment systems

Manage individual and team performance:

- Planning work and monitoring delivery
- Specifying what level of performance must be achieved
- Appraising staff, providing constructive feedback and identifying any areas for support and development
- Diagnosing the reasons why individual performance may not be meeting expectations

- Improving donor service and relationships
- Contributing evidence for organisational quality systems
- Providing specifications for contract tendering and monitoring those contracts

Identify training needs:

- Specifying the skills and competence needs of an organisation
- Identifying and prioritising individual or group learning needs and planning to meet them
- Identifying previously acquired skills, knowledge and competence
- Developing a strategic view of future development requirements

Structure learning programmes:

- Linking training to organisational objectives and economic need
- Increasing the relevance and credibility of training programmes
- Enabling new learners to see the complete picture and the relevance of training
- Broadening the base of skills needs that are recognised and met by the organisation
- Identifying learning opportunities at work

Evaluate the delivery of training:

- Providing a format and clear goals for structured learning at work
- Designing tailored training packages and assessing the relevance of predefined courses
- Defining the learning outcomes and progression routes for learners
- Supporting the design of evaluation tools
- Evaluating the effectiveness of training

Training and qualifications based on the National Occupational Standards

One of the key uses of National Occupational Standards is to provide a nationally recognised framework for training and qualifications. They can be used to inform, structure and develop unaccredited and accredited training, including that provided by professional bodies and Higher Education Institutions. Providers of development worker training and qualifications are encouraged to benchmark their courses to the standards and to inform Skills – Third Sector when they do so.

The SKiLD project, run by NAVCA, provides a range of resources and training specifically aimed at development workers. They offer a short course programme designed for both those new to development work and more experienced development workers who wish to develop new skills or widen the scope of their work. Resources include tools, workbooks and health checks that development workers can use with groups. They also support networks for development workers and can help people make contact with a network in their local area. For further information about SKiLD's work, please go to: www.skild.org.uk

What's in a National Occupational Standard?

A suite of standards is made up of units. The development worker standards comprise 17 units each constructed in the same way. This section describes these building blocks.

Units

These are the main functions in a job description. Each unit consists of one or more elements

Unit commentary

At the front of every unit there is a unit commentary designed to help you use the unit more effectively. It describes what the unit is about.

Performance criteria

These are the criteria against which competence in a task is assessed. They tell you what you must do to demonstrate that the standard has been met. They help individuals to do a job because they tell them how to do a task well. They also help managers or assessors, to evaluate an individual's competence against meaningful criteria.

Knowledge and understanding

Each unit identifies the knowledge and understanding individuals who achieve that particular unit require and lists useful resources and reading that will help individuals to achieve this knowledge and understanding.

How are the National Occupational Standards structured?

The standards have been developed to meet the generality of the roles, functions, skills and areas of competence that best capture the activities of development workers. Some of the units are new and have been developed specifically for the development worker cohort. Other units have been imported and tailored from other already developed suites of standards.

The full suite of standards, have been grouped into two categories, core and options. This is simply a reflection that some functions are what all development workers should be competent at (the core units) while other functions reflect the career path, development, or organisational structure, that individuals work in and follow (the optional units).

We also refer to other National Occupational Standards that development workers might find helpful to refer to or use in their jobs.

There is a very clear purpose for National Occupational Standards to form the building blocks of a wide range of competence-based qualifications. It is anticipated that the next step will be to develop a qualifications structure for development workers.

Explanation of terms

Client

In the context of these National Occupational Standards, references to clients mean the groups and communities, that is, community groups and voluntary sector organisations, with which the development worker is required to work including groups of **individuals etc.**

Core Units

In the context of these National Occupational Standards, these are the units that ALL development workers need to be competent in to carry out their work.

ENTO

The Standard Setting Body for Advice and Guidance, and the authorising body for Learning and Development on behalf of Lifelong Learning UK
www.ento.co.uk

IAG

Information, Advice and Guidance.

LLUK

Lifelong Learning UK. The Sector Skills Council for teaching, training and tutoring **www.lluk.org**

MSC

Management Standards Centre. The Standards Setting Body for the skills of Leadership and Management www.management-standards.org

NAVCA

National Association for Voluntary and Community Action www.navca.org.uk

NOS

National Occupational Standards. These are statements of the areas of competence and skill developed by sectors to properly describe what people do at work and is used as the 'building blocks' for a range of development and qualifications.

Optional Units

In the context of these National Occupational Standards, these are the units that SOME development workers need to be competent in to carry out their work.

SfEDI

Small Firms Enterprise Development Initiative. The Standard Setting Body for Small Firms www.sfedi.co.uk

SKiLD

Skills and Knowledge for Local Development. www.skild.org.uk

Skills for Justice

The Sector Skills Council for the Justice Sector, including police, probation, courts and prisons www.skillsforjustice.com

Skills - Third Sector

The organisation charged with identifying, promoting and developing skills in the voluntary sector. www.skills-thirdsector.org.uk

SSC

Sector Skills Council. A group of organisations, supported by employers and Government to identify, promote and develop skills and competence in the UK workforce



Summary of development worker National Occupational Standards

Unit Reference	Unit Title	Page
CORE UNITS		
Providing Information Advice and Guidance as a development worker		
This section covers knowing your clients, establishing contact, identifying client's needs and acting upon them, communicating information and providing support. As a development worker the support provided may relate to one or more of the following, for example:		
<ul style="list-style-type: none"> • Communication • Data protection • Developing social enterprise • Environmental issues • Equality and diversity • Finance • Fundraising/Income generation • Governance • Human resources • Information systems/ICT • Insurance • Learning and development • Legal advice (sources of...) • Marketing/promotion • Networks/ing • Partnership working • Performance monitoring and improvement • Policies and procedures • Procurement/tendering • Project management • Strategy/foresight • Working with volunteers • Working to regulatory frameworks 		
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Maintaining continuous professional development		
This section covers evaluating your own practice as a development worker, and ensuring continuing self development.		
DW10	Support the development of relationships and partnerships	36

Unit Reference	Unit Title	Page
OPTIONAL UNITS		
Developing Networks & Joint Working		
This section covers initiating and facilitating collaborative working between groups and communities, encouraging partnership and joint working.		
DW11	Undertake research for the service and its clients	38
Promoting Learning		
This section covers identifying learning needs of an organisation and the resources available currently to meet the need, developing a learning and development programme for the organisation, and enabling learning through presentations, demonstrations and instruction.		
<i>A full suite of National Occupational Standards for Learning and Development is available to support other aspects of learning delivery.</i>		
DW12	Making effective presentations	42
Project Development & Management		
This section covers developing and agreeing a plan for a project, monitoring and controlling implementation to ensure that the project achieves its key objectives.		
DW13	Manage a project	44
DW14	Manage a budget	48
Advocacy and representation		
This section covers advocacy and representation of groups and communities, lobbying and campaigning.		
DW15	Promote the needs, interests and rights of individuals and groups in the community	51
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Financial Sustainability		
DW17	Support Clients in developing sustainable income	56
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Understanding and engaging your clients

Overview

This unit is for anyone working as a development worker.

The unit covers

- Understanding the groups and communities with which you are required to work

Performance Criteria

You must be able to:

1. Describe the types of groups and communities with which you are required to work
2. Describe the structures of the groups and communities with which you work
3. Identify one or more appropriate methods to respond to your client's current developmental needs and explain your recommendations clearly
4. Identify resources that help you assess and prioritise the needs of the groups with which you work
5. Identify the sources of information and advice available to you
6. Identify requirements relating to equality, diversity and inclusion
7. Identify appropriate contacts within the groups and communities with which you are required to work
8. Communicate with and engage the groups and communities with which you are required to work
9. Maintain effective working relationships with your clients.



Knowledge and Understanding

You need to know and understand the following:

- a) The types of groups and communities with which you are required to work
- b) The context within which groups and communities operate
- c) The structures of different groups and communities
- d) The possible methods for working with groups and communities
- e) The sources of information and advice available to you
- f) The importance of safeguarding equality, diversity and inclusion in your work with groups and communities
- g) How to encourage groups and communities to integrate good practice in safeguarding equality, diversity and inclusion into the policies and procedures they develop
- h) The requirements for governance of the organisations with which you work
- i) How the organisations with which you work are financed
- j) The current position, pressures and priorities of your clients.
- k) The constituencies of your clients
- l) How to undertake a needs analysis and how to prioritise actions
- m) Your own limits and responsibilities and those of your organisation
- n) What the relevant national, local, professional, and organisational requirements are relating to safeguarding equal opportunities, discrimination, security, confidentiality, and data protection.



Know and understand the environment in which a development worker operates

Overview

This unit is about how your work, and that of your organisations and its clients, is influenced by the external environment.

Influences will include those within the following groups:

- Political
- Economic
- Social
- Technological
- Legal
- Environmental

Performance Criteria

You must be able to:

1. Identify the sources of information and intelligence available to enable you to establish the external influences affecting your work
2. Identify your role and responsibilities
3. Identify the demographics of your client group
4. Identify the ethnic, diversity and religious factors relating to your client group
5. Identify the economic factors and trends affecting your organisation and its clients
6. Identify the current priorities of your organisation
7. Identify current and proposed legislation which will affect your organisation and its clients
8. Identify Government policies which affect your organisation and its clients
9. Identify how funding, grants and initiatives impact on your work, your organisation and its clients
10. Work effectively with internal and external management committees
11. Identify environmental issues and/or initiatives which affect your organisation and its clients
12. Keep your knowledge of external influences affecting your work up to date



Knowledge and Understanding

You need to know and understand the following:

- a) Where to obtain information and intelligence about the external influences affecting your work
- b) The networks which are available to support you, your work and your organisation
- c) The culture of your organisation and its remit and responsibilities
- d) Your own role and responsibilities
- e) Demographics and how they influence your work
- f) Ethnic, diversity and religious factors and how they influence your work
- g) Economic factors and trends and how they influence your work
- h) The structure and role of the community and voluntary sector in your area/sector
- i) How community planning can be used to inform your work and that of your clients
- j) Current and proposed legislation and how they will affect your organisation and its clients
- k) Government policies and how they affect your organisation and its clients
- l) Regulatory bodies and how they affect your organisation and its clients
- m) How current and future funding, grants and initiatives impact on your work, your organisation and its clients
- n) How the work of lobbying and pressure groups affects your organisation and its clients
- o) The role of management committees, how they operate and how to report to them
- p) How technology affects your organisation and its clients
- q) How ecological and environmental issues and initiative affect you, your organisation and its clients
- r) Any external influences specific to the sector in which you work
- s) How to keep your knowledge of external influences affecting your work up to date
- t) What the relevant national, local, professional, and organisational requirements are relating to equal opportunities, discrimination, security, confidentiality, and data protection



Maintain effective development work relationships with clients

Overview

This is about managing your portfolio of development work clients, having rapport with each of those clients, whether an individual or a team, and helping to develop their trust in the organisation you work for. This requires you to exercise skills from good listening to client support and management and the promotion of your organisation's services.

This unit is tailored from the National Occupational Standards for Business Support (SfEDI) where it appears as Unit 1

Performance Criteria

You must be able to:

1. Maintain contact and exchange information with each client, in the ways that are appropriate and meet their need, through face to face meetings or by phone or e-mail
2. Encourage clients to judge when and how to share their views and concerns with you and among their team.
3. Find a style of discussion and exchange that helps an individual client or a client team to be open about development work matters
4. Clarify the roles and needs of different team members if you are working with a client team
5. Encourage your clients to clearly explain what they want to achieve, so that you can identify and arrange support services that may help them.
6. Direct clients who need specialist advice to those qualified to provide such support.
7. Propose and promote services that are likely to meet your clients' needs.
8. Advise clients about ways of resourcing, including financing, support for development
9. Make sure that your clients understand the roles and responsibilities of the support process and the limits of any contractual obligations.
10. Review with clients how they feel the relationship with you and your organisation is going
11. Keep up-to-date and accurate records of client contact at all stages of the relationship.
12. Explain to clients how confidentiality will be maintained.
13. End an engagement with a client in a way that encourages them to contact you for support in the future.



Knowledge and Understanding

You need to know and understand the following:

Interpersonal and communication skills

- A. How to use effective interpersonal and communication skills, including, when appropriate:
 - listening fully and attentively;
 - questioning;
 - checking accuracy;
 - summarising;
 - reflecting back;
 - challenging;
 - respecting and acknowledging issues;
 - negotiation;
 - giving, receiving and passing on constructive feedback;
 - dealing with difficulties.
- B. The benefits and drawbacks of different kinds of communication in different circumstances (for example, face-to-face contact, phone, fax and e-mail).

Support relationships

- C. You need to understand and take account of:
 - the conditions for accepting clients;
 - the benefits and drawbacks of working in different physical locations (for example, your organisation's premises or your client's premises);
 - the boundaries of the relationship between you and the client;
 - the ways that different clients prefer to work;
 - the limitations of your role and responsibilities; and
 - any relevant contractual obligations.
- D. The limits of your own abilities and understanding.
- E. why it is important to assure clients of confidentiality
- F. why it is important to maintain confidentiality
- G. How to recognise when a client needs more specialist:
 - support
 - advice (for example, an accountant, financial advisor, marketing specialist, IT consultant, and so on).

Funding and resources

- H. What support is available, what the referral procedures and costs are (for example, other kinds of development support, specialist advice, learning and information resources).
- I. How to co-ordinate support services that match different client needs.
- J. The funding that is available and relevant to the client's needs.
- K. The procedures of funding agencies.



This unit is tailored from the National Occupational Standards for Advice and Guidance (ENTO), where it appears as Unit AG2

Provide information to clients

Overview

This Unit is for you if your role is the provision of information to clients. The information may be in written format or may be provided orally. Other formats and communication methods, e.g. signing, Braille etc. may also be used according to the needs of the client.

“Clients” in the context of this unit means groups, groups of individuals, etc.

The Unit requires you to:

- Identify the information required by clients
- Provide information to meet the needs of clients

As a development worker the information provided may relate to one or more of the following, for example:

- Communication
- Data protection
- Developing social enterprise
- Environmental issues
- Equality and diversity
- Finance
- Fundraising/Income generation
- Governance
- Human resources
- Information systems/ICT
- Insurance
- Learning and development
- Legal advice (sources of...)
- Marketing/promotion



- Networks/ing
- Partnership working
- Performance monitoring and improvement
- Policies and procedures
- Procurement/tendering
- Project management
- Strategy/foresight
- Working with volunteers
- Working to regulatory frameworks

Performance Criteria

You must be able to:

1. Explore with the client their reasons for their information needs
2. Assess correctly the client's needs for information
3. Confirm the information required with the client
4. Agree with the client how the information will be provided
5. Refer clients to additional or alternative sources of relevant information
6. Comply with all relevant legislation, codes of practice, guidelines and ethical requirements
7. Retrieve relevant information from the appropriate systems
8. Provide sufficient and suitable information to meet client's needs
9. Make sure the information provided is current and capable of meeting a diverse range of needs
10. Check client's understanding of the information
11. Assist clients to obtain other relevant information
12. Identify any problems with providing the information and take appropriate action to address them
13. Agree with clients any further activities that are necessary to meet their needs



Knowledge and Understanding

You need to know and understand the following:

- a) The different reasons clients may have for seeking information
- b) The kinds of information that may be sought
- c) How to assess clients' needs
- d) Why it is important to confirm the information required with clients
- e) Why it is important to agree how the information will be provided
- f) What other sources of information could help the clients
- g) The relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality and data protection
- h) Why it is important to comply with different requirements and the consequences of non-compliance
- i) How to obtain information on the requirements
- j) The different methods that are available for providing information
- k) How information can be presented in different formats
- l) Organisational systems for recording information and why it is important to use the systems
- m) How much information should be provided for different clients
- n) What type of information is suitable
- o) How to check the currency, accuracy and suitability of the information that is provided
- p) How to ensure the information is free from stereotypes and is not biased
- q) How to check clients' understanding of the information
- r) What other sources of information are available
- s) What additional information is available
- t) How to contract external organisations to undertake research and provide information if necessary and the organisations procedures for such procurement
- u) What are the types of problem that could occur and what actions can be taken to address them



Help the client to analyse their organisation and decide the way forward

Overview

This is about enabling your clients to develop a clear picture of their organisation, where it is and where it is heading. To do that they need to analyse the current performance and identify their needs.

This unit is tailored from the National Occupational Standards for Business Support (SfEDI) where it appears as Unit 2.

Performance Criteria

You must be able to:

1. Help your clients to express their thoughts about their organisation's performance, its direction and the values of the organisation and its stakeholders
2. Work with clients to evaluate and explain their current situation, using established measures and diagnostic tools where appropriate.
3. Help clients obtain the information they need to review their organisation, including the ideas of other stakeholders.
4. Help the client identify which parts of their activities would benefit from change.
5. Inspire the client to seek new opportunities for the organisation.
6. Challenge and encourage clients to set practical, specific and ambitious organisational objectives for the short-, medium- and longer-term.
7. Help the client identify obstacles to improved organisational performance.
8. Help clients evaluate possible changes against organisational objectives, risks and benefits and understand what may be involved in achieving the results required
9. Challenge and encourage clients to prioritise changes and identify the problems to be dealt with first.
10. Identify a suitable form of plan that the client can use to record and manage the identified changes and help them prepare it
11. Help the client consult with other stakeholders and obtain buy-in to the plan
12. Work with clients in a way that allows them to develop these analytical skills for themselves.



Knowledge and Understanding

You need to know and understand the following:

Communication and interpersonal skills

- A. How to use effective interpersonal and communication skills.
- B. The benefits and drawbacks of different kinds of communication (for example, face-to-face contact, phone, fax and e-mail).

Performance analysis

- C. Performance data analysis and performance measures (for example, setting indicators and data gathering, service user feedback, quality assurance, evaluation cycles, creation of a monitoring framework, selecting an appropriate quality system, comparisons with other similar organisations (for example, through benchmarking)).
- D. Qualitative and quantitative analytical and diagnostic techniques (for example, SWOT, PEST, five forces or variance analysis).
- E. Financial appraisal techniques.
- F. Risk assessment techniques.
- G. Analysis of organisational culture
- H. Identification of stakeholders and their influence
- I. Profiling of individuals' strengths, weaknesses and motivation
- J. Common problems and opportunities organisations may face.

Planning

- K. How to build support among stakeholders for policies, strategies and plans.
- L. How to define organisational objectives, actions, structures, roles and responsibilities.
- M. Financial planning.
- N. Development, presentation and use of plans.
- O. Identifying trends and developments that may affect the organisation
- P. Barriers or obstacles to improving performance (for example, personal, interpersonal issues, competing pressures, funding or skills).
- Q. Sources of new opportunities (for example, networking, internal and external trends, collaboration with other organisations).

Providing business support

- R. The dynamics of development work support relationships.
- S. The limits of your own skills and knowledge.
- T. The guidelines for providing development work services set by your organisation:
 - maintaining confidentiality;
 - ethics, values and professional standards;
 - equal opportunities, diversity and social inclusion;
 - funding and other support available to the client;
 - using information management systems; and
 - procedures for quality assurance and handling complaints.
- U. The features and benefits of the development work support services you provide, and those of any other services that you direct clients to.



Enable clients to implement changes within their organisation

Overview

This is about enabling the client to develop realistic action plans to make changes to their organisation they have identified as necessary and to access any additional support and resources that may be required to deliver those changes. These changes may have been expressed in a development plan or strategy that now needs acting on. You may be working with an individual or a team.

This unit is tailored from the National Occupational Standards for Business Support (SfEDI) where it appears as Unit 3

Performance Criteria

You must be able to:

1. Evaluate the client's readiness to implement the changes and help them develop the necessary commitment.
2. Identify the client's stated or unstated objections and provide them with facts and evidence
3. Encourage clients to recognise the benefits of change.
4. Work with clients to prioritise specific actions against objectives, risks and benefits and the urgency of changes needed
5. Support clients to work out what may be involved in achieving the results they would like.
6. Help the client identify stakeholders or other people who can help
7. Help clients to develop and evaluate an action plan, including:
 - setting short- and longer-term goals;
 - actions and timescales;
 - identifying what resources will be needed, where they will come from and how they will be used;
 - assigning roles and responsibilities;
 - managing risks; and
 - monitoring performance.
8. Agree with clients the role that you will play in supporting the action plan and gaining access to any additional support and resources needed.
9. Help clients to consult with and get buy-in from other stakeholders who will have to carry out the action plan or whose agreement to it is needed, acting as advocate if needed.



Performance Criteria

10. Make yourself available as agreed to support the client while the action plan is carried out.
11. Monitor the implementation of the action plan with the client and support them in dealing with contingencies and re-planning when necessary

Knowledge and Understanding

You need to know and understand the following:

Interpersonal and communication skills

- A. How to use effective interpersonal and communication skills.
- B. The benefits and drawbacks of different kinds of communication (for example, face-to-face contact, phone, fax and e-mail).

Supporting client development

- C. How to judge clients readiness and commitment to making changes (for example, resolving ambivalence, conflict between competing ideas and changing habitual behaviour).
- D. How to combine and co-ordinate support services.
- E. How to respond to the client's values, ways of thinking and organisational needs.
- F. How to develop your client's self-confidence.
- G. How to assist client's decision making in a way which promotes their autonomy.
- H. How to help your clients to review and develop skills that will improve their ability to compete with other organisations.
- I. How to delegate effectively.



Providing support services

- J. The dynamics of development work support relationships.
- K. The limits of your own skills and knowledge.
- L. The guidelines for providing support services set by your organisation about:
 - maintaining confidentiality in different working environments;
 - ethics, values and professional standards;
 - equal opportunities, diversity and social inclusion;
 - funding and other support available to the client ;
 - using information management systems;
 - procedures for quality assurance and handling complaints.
- M. The features and benefits of the development work services you provide, and those of any other services that you direct clients to.

Problem solving

- N. How to solve problems, by:
 - identifying possible problems and opportunities;
 - monitoring and evaluating progress; and
 - evaluating the benefits and drawbacks of different decisions.
- O. The most suitable options and the options most appropriate to specific issues.
- P. How to challenge clients in overcoming obstacles and barriers to achievement.
- Q. How to support clients in dealing with problems and difficulties that may exist in achieving solutions.

Action planning

- R. How to enable clients to plan, set objectives and decide what is important.
- S. How to support clients in identifying and considering alternative implementation strategies.
- T. How to help clients with risk-benefit comparisons.
- U. How to engage clients with contingency planning and risk assessment.
- V. What may be involved in achieving the results clients would like (for example, commitment of other people, skills, knowledge, information).



Enable groups and communities to become autonomous

Overview

This is about developing the client's autonomy. The client may be a community group or voluntary sector organisation. It involves challenging, inspiring, provoking, stimulating and facilitating the client to develop new ways of working, building their commitment to action and ability to become self-sustaining.

This unit is tailored from the National Occupational Standards for Business Support (SfEDI) where it appears as Unit 4

Performance Criteria

You must be able to:

1. Work with clients to identify their:
 - aspirations;
 - style of learning; and
 - obstacles and stated and unstated objections to changing their ways of working.
2. Where necessary, challenge their objections to change
3. Work with clients to identify the know-how that would enable them to develop new opportunities for the organisation or new ways of working.
4. Agree with clients the ways of learning that will be effective.
5. Use a mode of consulting that is likely to be effective for each client at each stage of the relationship (for example, co-consulting, coaching).
6. Use these chosen ways of learning and consulting when providing development work services to the client
7. Support clients' access to support resources that they can choose from.
8. Help the client to resolve issues that might otherwise be obstacles to change.
9. Encourage and reinforce clients in putting identified changes into action by providing feedback.



Knowledge and Understanding

You need to know and understand the following:

Interpersonal and communication skills

- A. How to use effective interpersonal and communication skills, including for:
- working with clients;
 - listening fully and attentively;
 - questioning;
 - checking accuracy;
 - summarising;
 - reflecting back;
 - challenging;
 - influencing
 - respecting and acknowledging issues;
 - interviewing, reviewing and deciding on needs;
 - negotiation;
 - giving, receiving and passing on constructive feedback;
 - guaranteeing client confidentiality; and
 - dealing with difficulties.
- B. The benefits and drawbacks of different kinds of communication (for example, face-to-face contact, phone, fax and e-mail).

Support relationships

- C. You need to understand and take account of:
- the conditions for accepting clients onto development work services;
 - the benefits and drawbacks of working in different physical locations (for example, your organisation's premises or your client's premises);
 - the boundaries of the relationship between you and the client;
 - the ways that different clients prefer to work;
 - the limitations of your role and responsibilities; and
 - any relevant contractual obligations.
- D. The limits of your own abilities and understanding.

Providing support services

- E. How to respond to the client's values, ways of thinking and needs.

Supporting client development

- F. How to develop your client's self-confidence.
- G. How to work with your clients to help them to develop skills that will improve their ability to compete with other organisations and become self-sustaining
- H. The theories and application of learning styles
- I. What obstacles or barriers there may be to changing practices



Evaluate and develop own contribution as a development worker

Overview

This unit covers:

- Evaluating own practice
- Ensuring continuing self-development
- Evaluating contribution to own organisation

This unit has been tailored from the National Occupational Standards for Advice and Guidance (ENTO) where it appears as unit AG 16

Performance Criteria

You must be able to:

Evaluate Own Practice

1. Identify suitable criteria for evaluating own practice
2. Review relevant information to evaluate own practice
3. Evaluate own practice against specified criteria
4. Review relevant feedback on own practice
5. Identify own contribution to achieving the objectives of the organisation
6. Identify how your own practice aligns to the values, aims and mission of the organisation
7. Review the effect of own values, beliefs, attitudes, and behaviours when working
8. Review the priorities assigned to different work objectives
9. Identify how one has complied with all relevant legislation, codes of practice, guidelines, and ethical requirements
10. Draw suitable conclusions on how one has undertaken own practice

Ensure continuing self-development

11. Identify realistic development objectives and establish their priority
12. Ensure the development objectives identify the competences that are appropriate to the work of the service
13. Devise a personal development plan to deliver own development objectives
14. Maintain and update relevant knowledge of the service, organisation, sector, and profession



15. Identify any developments that can be effectively incorporated into own practice
16. Assess any trends and developments in the work of the sector that have an impact on own practice
17. Agree the personal development plan with the appropriate people and secure sufficient resources to implement it
18. Identify and utilise suitable development opportunities
19. Record the personal development plans in the appropriate systems
20. Review and update personal development plans regularly to take account of changing practice and other factors

Knowledge and Understanding

You need to know and understand the following:

Evaluate Own Practice

- A. which evaluation criteria could be used
- B. what types of information on own practice is relevant
- C. how much information on own practice should be reviewed
- D. how to evaluate own practice against criteria
- E. what feedback on own work should be considered and who can provide it
- F. what the values, mission and objectives of the organisation are
- G. what factors could affect the achievement of the objectives
- H. how your own values, beliefs, attitudes, and behaviours impact on practice
- I. how to assess the priorities assigned to own work
- J. the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- K. why it is important to comply with different requirements
- L. what the consequences are of not complying with different requirements
- M. how to obtain information on the requirements
- N. why it is important to have a clear understanding of own practice
- O. how any conclusions can be used to improve work



Knowledge and Understanding

Ensure continuing self-development

- P. how to identify development objectives
- Q. what the specific development objectives are and how to prioritise them
- R. which competences are required for the work of the organisation
- S. how to devise a personal development plan and what it should include
- T. what types of knowledge are required of the service, organisation, sector, and profession
- U. the relevant and current sources of knowledge of the service, organisation, sector, and profession
- V. how to assess the relevance of the knowledge
- W. what types of developments in theory, research, and practice might be relevant
- X. how these can be incorporated into own practice
- Y. how the sector has developed
- Z. what types of development will occur in the future
- AA. who can agree the personal development plan
- BB. what resources are required to implement the personal development plan
- CC. what types of development opportunity are available
- DD. how to assess the benefits of training and other forms of development
- EE. what the systems are for recording personal development plans and what the procedures are that relate to the use of these
- FF. why it is important to use the systems
- GG. when personal development plans should be reviewed
- HH. who might require information on the personal development plans

This unit is tailored from the National Occupational Standards for Learning and Development (ENTO/LLUK) where it appears as Unit L2



Identify the learning and development needs of the groups you work with

Overview

This unit is appropriate for you if your role involves:

- identifying the learning and development opportunities within an organisation
- identifying the expectations of stakeholders and sponsors, and getting their commitment
- identifying overall learning and training needs
- managing learning and development services

The activities you are likely to be involved in:

- using audits, surveys and interviews to identify learning and development needs
- identifying the development needs and opportunities for individual work roles
- reviewing developments in technology-based learning
- identifying the existing abilities and competences of individuals within the organisation and planning future training and development needs
- responding to external factors that influence human resources
- working with other people on major new developments
- getting the commitment of other people
- Assessing the impact of learning and development programmes



Performance Criteria

You must be able to:

Review how capable the whole organisation is of meeting its development needs

1. Identify the organisation's needs and expectations of learning and development.
2. Identify how learning and development contributes to the organisation's objectives and confirm this with key stakeholders.
3. Identify the abilities and competences the organisation needs to meet its objectives.
4. Evaluate the effect of the organisation's future needs on its ability to carry out its business.
5. Collect information on the existing levels of skills, knowledge and experience of individuals.
6. Identify the resources and structures available to meet the needs of the organisation.
7. Match the abilities of individuals with the needs of the organisation.
8. Identify priority areas for learning and development across the organisation.

Support the development of learning and development programmes

9. Identify development opportunities for individuals which will improve the organisation.
10. Identify how skills and competences can be shared and transferred between individuals in the organisation.
11. Identify appropriate learning and development opportunities inside and outside the organisation.
12. Consider different ways of structuring and delivering learning and development, including technology-based delivery and support.
13. Identify effective management systems to review and monitor learning programmes.
14. Develop learning and development programmes for individuals and groups within the organisation that recognise the needs of the people involved.
15. Support the development of action plans for putting the programmes into practice
16. Identify the outcomes required and the measure to be used to monitor and evaluate the impact of the learning and development programmes.
17. Ensure that the required resources are identified and planned.
18. Identify the roles and responsibilities of the people delivering the programme.
19. Get the commitment of the people who will put the programme into practice.
20. Monitor and evaluate the impact of the learning and development programmes.



Knowledge and Understanding

You need to know and understand the following:

The nature and role of learning and development within the organisation

- A. how to identify the features of and necessary conditions for an organisation that continuously learns and develops
- B. how to identify and respond to the internal factors that drive learning needs
- C. how issues of equality, equity, diversity and access influence the planning of learning and development
- D. how to identify a range of possible training and development outcomes that support the organisation's strategy
- E. how to identify the things that might affect how training is delivered and how to draw up plans to deal with these
- F. who the main people in the organisation are who can bring about change and how to influence them
- G. what responses and objections to training and development aims you are likely to get and how to deal with these

Principles and concepts

- H. how to evaluate different ways of delivering learning and development - and their relevance to the needs of the organisation and individuals
- I. how to identify and evaluate changes and developments in technology and e-learning - and their relevance to how the organisation delivers learning and development
- J. how to identify the learning opportunities available and how to use resources to access them
- K. how to access sources of information to help forecast trends and developments in learning and development
- L. how to choose appropriate quality control and quality assurance systems when delivering training, and how to take account of current national debates on quality improvement
- M. how to assess the impact of learning and development programmes on performance

External factors influencing human resource development

- N. how to identify the external influences on delivering learning and development policies, including economic, social and political
- O. how to analyse and use developments in learning and new ways of delivery
- P. how to identify and use developments in e-learning and other technological developments when planning learning



Support the development of relationships and partnerships

Overview

This unit covers:

- Support and encourage groups and communities to work collaboratively and in partnerships

Performance Criteria

You must be able to:

1. Create opportunities for groups and communities to share and develop skills, values and experience
2. Support groups and communities to develop collaborative activities
3. Support groups and communities to develop ground rules for joint work
4. Support groups and communities to agree the aims and objectives of collaborative work
5. Make sure commitments are achievable
6. Make sure joint working promotes respect for others
7. Promote inclusion in collaborative activities
8. Monitor working relationships and provide appropriate support to ensure representation and accountability
9. Facilitate regular information exchange and collaborative working that values diversity and autonomy
10. Monitor and assess the effectiveness and impact of partnership arrangements
11. Monitor and review the effectiveness of networking arrangements and resources devoted to these
12. Encourage representation in statutory decision making
13. Promote the values of community empowerment in statutory processes



Knowledge and Understanding

You need to know and understand the following:

- A. The value of collaborative working and partnerships
- B. How to identify and contact the full range of interest groups
- C. The range of appropriate methods and styles for contacting people, organisations and a full range of interest groups
- D. How to analyse and evaluate potential areas of collaboration and manage conflict
- E. Methods for promoting community empowerment and involvement
- F. Procedures for handling confidential and sensitive information
- G. How to create suitable opportunities for the exchange and development of skills, values and perspectives
- H. The importance of agreeing and regularly reviewing, common aims, objectives and ground rules within partnerships and networks
- I. The importance of ensuring respect for others, and of valuing the contribution people make to collaborative working
- J. The importance of fulfilling commitments to others
- K. How to create links with other organisations in different fields, areas and cultures in order to promote inclusion and collaborative working
- L. The effect of our behaviour and presentation on maintaining effective working relationships
- M. Statutory decision making processes at local, regional and national level



This unit is tailored from the National Occupational Standards for Advice and Guidance (ENTO) where it appears as unit AG 19

Undertake research for the service and its clients

Overview

This unit is about:

- Identifying sources and availability of information
- Collecting information to achieve research objectives
- Analysing information collected from research:
- Reporting the results of research:

As a development worker the research and information provided may relate to the following, for example:

- Legal advice
- HR
- Using volunteers
- Finance
- E&D

- Insurance
- Data protection
- Developing social enterprise
- Policies and procedures
- Information systems/ICT
- Communication
- Networks/ing
- Partnership working
- Marketing/promotion
- Performance monitoring and improvement
- Project management
- Learning and development
- Fundraising/Income generation
- Governance



Performance Criteria

You must:

Identify sources and availability of information:

1. Identify clearly the type and range of information required
2. Identify and evaluate the sources of information for their contribution to the research
3. Approach sources of information with a clear explanation of the purpose of the research
4. Ascertain clearly the procedures that are required to access the information
5. Specify clearly any risks to the sources of information from the research
6. Identify any problems with the collection of necessary information and take appropriate action to deal with them
7. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements

Collect information to achieve research objectives:

8. Access the sources of information according to agreed procedures
9. Collect information in line with the requirements of the research
10. Apply information collection methods correctly and consistently
11. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements
12. Identify any problems with the collection of necessary information and take appropriate action to deal with them
13. Record the collected information in the appropriate systems

Analyse information collected from the research:

14. Ensure the analysis methods are appropriate to the information and the aims of the research
15. Analyse information accurately according to the appropriate methodology
16. Interpret and synthesise the results carefully, and draw suitable conclusions
17. Identify any unexpected results and suggest reasons for them
18. Record the results of the analysis in the appropriate systems
19. Review the progress of the research with the relevant people wherever possible

Report the results of the research:

20. Present the results of the research in a manner appropriate to its aims and objectives
21. Acknowledge appropriately all sources of information
22. Review the results of the research with the relevant people wherever possible
23. Protect confidential information in accordance with agreements and procedures
24. Evaluate the success of the research against the specified evaluation criteria
25. Record the results of the research in the appropriate systems
26. Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements



Knowledge and Understanding

You need to know and understand the following:

Identify sources and availability of information:

- A. what types of information are required
- B. what the potential sources of information are
- C. how the sources of information have co-operated in the past
- D. why it is important to be clear about the research being undertaken
- E. what the access procedures for different types of information are
- F. the rules of confidentiality relating to different types of information
- G. what the different risks are that should be considered
- H. how to minimise the effects of any risks
- I. what the types of problem are that could occur
- J. what actions can be taken to address them
- K. why it is important to address problems
- L. what the implications are of not addressing the problems
- M. the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- N. why it is important to comply with different requirements
- O. what the consequences are of not complying with different requirements
- P. how to obtain information on the requirements

Collect information to achieve research objectives:

- Q. what the agreed procedures are for accessing information
- R. which information collection procedures are required
- S. why it is important to apply the collection methods correctly and consistently
- T. what the consequences are of not applying the collection methods correctly and consistently
- U. the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- V. why it is important to comply with different requirements
- W. what the consequences are of not complying with different requirements
- X. how to obtain information on the requirements
- Y. what types of problem could occur
- Z. what actions can be taken to address them
- AA. why it is important to address problems
- BB. what the implications are of not addressing the problems
- CC. what the systems are for recording information and the procedures relating to the use of these
- DD. why it is important to use the systems



Knowledge and Understanding

Analyse information collected from the research:

- EE. which analysis methods could be used
- FF. what analysis methods have proved most useful in the past
- GG. how to use the analysis methods
- HH. how to present research results
- II. why it is important to provide a rationale for the results
- JJ. what types of result are expected
- KK. the possible reasons for unexpected results
- LL. what the systems for recording analysis results are and the procedures that relate to the use of these
- MM. why it is important to use the systems
- NN. who should be involved in reviewing the research

Report the results of the research:

- OO. how to present different types of research results
- PP. who should be acknowledged in the research
- QQ. who should be involved in reviewing the research
- RR. what types of information sources should be protected
- SS. what types of information might be confidential
- TT. what the criteria are for evaluating the success of the research
- UU. what the systems are for recording research results and the procedures that relate to the use of these
- VV. why it is important to use the systems
- WW. the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- XX. why it is important to comply with different requirements
- YY. what the consequences are of not complying with different requirements
- ZZ. how to obtain information on the requirements



This unit is tailored from the National Occupational Standards for Learning and Development (ENTO/LLUK) where it appears as Unit L10

Making effective presentations

Overview

This unit is appropriate for you if your role involves:

- making effective presentations

Performance Criteria

You must be able to:

Give presentations to groups

1. Take account of the size and different needs of the people in the audience when deciding on how to deliver the presentation.
2. Present information in a tone, manner and at a speed which is appropriate to the needs and capabilities of the audience.
3. Use visual aids and technology which support the information you are presenting
4. Encourage participants to ask questions and get explanations at appropriate stages in the presentation.
5. Give clear and accurate information to reinforce points in the presentation.
6. Reduce distractions and disruptions as much as possible.
7. Obtain feedback on presentations and use this to inform future developments



Knowledge and Understanding

You need to know and understand the following:

- A. when it is appropriate to provide information using presentations
- B. how to choose from a range of presentation techniques
- C. how to put information in order and decide whether the language you will be using is appropriate for the audience
- D. how to structure presentations and activities
- E. how to use technology effectively
- F. how to engage an audience
- G. how to check audience understanding
- H. how to choose and prepare appropriate visual aids and technology
- I. how to use appropriate forms of questioning during presentations
- J. the relevant national, local, professional, and organisational requirements are that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- K. How to gather and use feedback on presentations to inform developments



This unit is tailored from the National Occupational Standards for Management and Leadership (Management Standards Centre) where it appears as unit F1

Manage a project

Overview

This unit is about managing a project for which you have been given responsibility. This involves developing and agreeing a plan for the project and monitoring and controlling implementation of and changes to the plan. It also involves ensuring that the project achieves its key objectives and is completed to the satisfaction of the project sponsor(s) and any key stakeholders.

Performance Criteria

You must be able to:

1. Discuss and agree the key objectives and scope of the proposed project and the available resources with the project sponsor(s) and any key stakeholders.
2. Identify how the proposed project fits with the overall vision, objectives and plans of the organisation and any programmes of work or other projects being undertaken.
3. Develop, in consultation with relevant people, a realistic and thorough plan for undertaking the project and achieving the key objectives.
4. Discuss and agree the project plan with the project sponsor(s) and any key stakeholders, making changes where necessary.
5. Brief any project team members on the project plan and their roles and responsibilities and provide ongoing support, encouragement and information.
6. Put processes and resources in place to manage potential risks arising from the project and deal with contingencies.
7. Implement the project plan, selecting and applying a range of basic project management tools and techniques to monitor, control and review progress.
8. Communicate progress to the project sponsor(s), any key stakeholders and any project team members on a regular basis.
9. Identify, in the light of progress and any problems encountered and wider developments, any required changes to the project plan, obtaining agreement from project sponsors and any key stakeholders where necessary.
10. Achieve project objectives using the agreed level of resources.



11. Confirm satisfactory completion of the project with the project sponsor(s) and any key stakeholders.
12. Evaluate the success of the project, identifying what lessons can be learned and recognising the contributions of any project team members.

Behaviours which underpin effective performance:

1. You recognise changes in circumstances promptly and adjust plans and activities accordingly
2. You find practical ways to overcome barriers
3. You present information clearly, concisely, accurately and in ways that promote understanding
4. You create a sense of common purpose
5. You make best use of available resources and proactively seek new sources of support when necessary
6. You act within the limits of your own authority
7. You are vigilant for potential risks and hazards
8. You take pride in delivering high quality work
9. You take personal responsibility for making things happen

Knowledge and Understanding

You need to know and understand the following:

General knowledge and understanding

- A. The fundamental characteristics of projects as opposed to routine management functions/activities
- B. The role and key responsibilities of a project manager
- C. Key stages in the project lifecycle
- D. The importance of the relationship between the project manager and the project sponsor(s) and any key stakeholders
- E. Why it is important to discuss and agree the key objectives and scope of a proposed project with the project sponsor(s) and any key stakeholders before detailed planning commences
- F. The type of information needed for effective project planning
- G. Why it is important to be able to identify and understand how a project fits with the overall vision, objectives and plans of the organisation and any programmes of work or other projects being undertaken
- H. Why it is important to consult with relevant people in developing a project plan and how to do effectively
- I. What should be included in a project plan, particularly activities, required resources and timescales and why the plan needs to be discussed and agreed with the project sponsor(s) and any key stakeholders
- J. Why it is important that any project team members are briefed on the project plan, their roles and responsibilities and how to do so effectively
- K. Ways of providing ongoing support, encouragement and information to any project team members



Knowledge and Understanding

- L. Ways of identifying and managing potential risks in relation to the project
- M. The importance of contingency planning and how to do so effectively
- N. How to select from and apply a range of basic project management tools and techniques to monitor, control and review progress of the project
- O. Effective ways of communicating with project sponsor(s) and any key stakeholders during a project
- P. The importance of agreeing changes to the project plan with the project sponsor(s) and any key stakeholders
- Q. The type of changes that might need to be made to a project plan during implementation
- R. Why it is important to confirm satisfactory completion of the project with the project sponsor(s) and any key stakeholders and how to do so effectively
- S. How to establish effective systems for evaluating the success of projects and identifying lessons for the future
- T. The importance of recognising the contributions of project team members to the success of projects and different ways of doing so

Industry/sector specific knowledge and understanding

- U. Project management tools and techniques commonly used in the industry or sector
- V. Risks and contingencies common to the industry/sector
- W. Industry/sector specific legislation, regulations, guidelines and codes of practice

Context specific knowledge and understanding

- X. The project sponsor(s) – the individual or group for whom the project is being undertaken
- Y. Key stakeholders – the individuals or groups who have a vested interest in the success of the project and the organisation
- Z. The agreed key objectives and scope of the proposed project and the available resources
- AA. The overall vision, objectives and plans of the organisation and any other relevant programmes of work or other projects being undertaken
- BB. Mechanisms for consulting on the development of the project plan and the views/thoughts received from relevant people in relation to proposals
- CC. The agreed project plan
- DD. The roles and responsibilities of any project team members
- EE. Methods used for briefing, supporting, encouraging and providing information to any project team members
- FF. Processes and resources put in place to manage potential risks and deal with contingencies
- GG. Type and nature of potential risks identified and contingencies encountered
- HH. Specific project management tools and techniques used to monitor, control and review progress
- II. Processes in place for communicating information on progress of the project to the project sponsor(s), any key stakeholders and any project team members



Knowledge and Understanding

- JJ. Processes in place for identifying and agreeing changes to the project plan and any changes which have made
- KK. Processes for confirming satisfactory completion of the project with the project sponsor(s) and any key stakeholders
- LL. Processes for evaluating the success of the project and any lessons which have been learned from undertaking the project Methods used for recognising the contributions of any project team members to successful projects



This unit is tailored from the National Occupational Standards for Management and Leadership (Management Standards Centre) where it appears as unit E1

Manage a budget

Overview

What is this 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.

Performance Criteria

You must be able to:

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

- A. The purposes of budgetary systems
- B. Where to get and how to evaluate the available information in order to be able to prepare a realistic budget
- C. The importance of spending time on and consulting with others in preparing a budget
- D. How to discuss, negotiate and confirm a budget with people who control the finance and the key factors that should be covered
- E. How to use a budget to actively monitor and control performance for a defined area or activity of work
- F. The main causes of variances and how to identify them
- G. What different types of corrective action which could be taken to address identified variances
- H. How unforeseen developments can affect a budget and how to deal with them
- I. The importance of agreeing revisions to the budget and communicating the changes
- J. The importance of providing regular information on performance against the budget to other people
- K. Types of fraudulent activities and how to identify them
- L. The importance of using the implementation of the budget to identify information and lessons for the preparation of future budgets



Knowledge and Understanding

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

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



Promote the needs, interests and rights of individuals and groups in the community

Overview

This unit focuses on the campaigning and promotional function to explain and assert the rights and roles of individuals. The standards in this unit combine the expectations of promotion with expectations as to how individuals may themselves be involved in representing their interests. Promotion ranges from informal means through to formal presentations at meetings and work with radio, television and the press.

This unit is designed to be applicable to all workers who have a role in promoting the needs and rights of individuals and groups in the community

This unit is taken from the National Occupational Standards for Community Justice (Skills for Justice) where it appears as unit BA6

Performance Criteria

You must be able to:

Promote the rights and interests of individuals and groups in the community

1. use **methods of promotion** and promote rights consistent with
 - the agency's policies,
 - individuals' assessed needs and expressed desires, and acknowledge individual differences and preferences among groups of individuals
2. use methods of promoting rights which are
 - practicable, legal and ethical
 - acceptable to those involved
 - of a kind likely to be effective
3. communicate messages and use methods which do not adversely reflect on or affect others at risk or in need in the community
4. monitor and review the impact of methods used and change methods if necessary to maintain effective, anti-discriminatory promotion

Methods of promotion

- formal
- informal
- networks
- community
- media.



Help individuals to represent their own interests

5. give assistance to individuals consistent with the policies of the agency to enable them to identify their own interests and rights within statutory and legal frameworks and in relation to other identifiable groups
6. explore carefully with individuals the implications when the pursuit of rights and interests adversely reflects on or is oppressive to others
7. make available to individuals within agreed boundaries of confidentiality the information which will be of use to them or which they request
8. offer support, encouragement and feedback to individuals and help them to express themselves clearly and assertively
9. provide individuals with facilities for communication in line with agency policy and resources
10. extend support to individuals' families, friends and community contacts when they are working in support of individuals' interests.
11. help individuals to make contact and take advantage of external sources of support or expertise which may be of use to them
12. discuss openly barriers to individuals' interests or being able to represent them if there are any and develop methods of dealing with them.

Methods for representing interests

- formal
- informal
- networks
- community
- media.

Facilities for communication

- information technology
- translation
- interpretation



Knowledge and Understanding

You need to know and understand the following:

- A. The nature and legal and agency basis of rights for individuals and groups in their context
- B. Agencies providing information, advice and support on rights
- C. Strategies for dealing with oppression, disadvantage and discrimination and research on individuals' view of them and on their effectiveness
- D. How individual and structural discrimination can undermine and exclude people from exercising their rights and responsibilities
- E. The remit and responsibilities of agencies in negotiation and conciliation
- F. Potential conflicts between the rights and responsibilities of individuals and groups and those in the wider community
- G. Strategies and techniques of communication with different audiences
- H. Sources of information, advice and support on rights and how individuals can access them
- I. Typical barriers to individual interests and methods of overcoming them



Lobby for influence

Overview

This unit covers:

- Lobbying, campaigning and influencing

Performance Criteria

You must be able to:

1. Engage in the direct or indirect lobbying of politicians and civil servants towards achieving agreed objectives
2. Monitor and evaluate the effectiveness of lobbying and public affairs activity, adjusting plans and actions accordingly to achieve the stated objectives
3. Build and maintain effective professional relationships with key political stakeholders
4. Operate within relevant legal regulatory frameworks and codes of practice



Knowledge and Understanding

You need to know and understand the following:

- a) The structure of government and the civil service, and the principal differences between these
- b) Relevant procedures and protocols
- c) The workings of parliament and government, and the lobbyist's role in exercising influence
- d) The mechanics of the legislative process, and associated procedures
- e) Public affairs techniques and how to use these towards influencing government
- f) Legal, regulatory and ethical requirements affecting the lobbying for influence and within which public affairs practitioners operate, relevant to the organisation's sector
- g) The sectors and circumstances in which public affairs practitioners operate, relevant to the organisation's industry
- h) The sector in which the organisation operates
- i) Key external and internal developments affecting the organisation, the nature of their impact, and the implications for public affairs campaigns and lobbying for influence
- j) The organisation's key stakeholders, and their interests and requirements relating to the organisation



Support clients in developing sustainable income

Overview

This unit is for anyone working as a development worker.

The unit covers:

Supporting groups and communities to explore and exploit a full range of funding and financing options (for example, grants, donations and income from trading) to develop a sustainable funding mix.

Performance Criteria

You must be able to:

1. Gather examples of good practice/case studies relating to sources of diverse income to share with groups and communities
2. Support groups and communities to analyse their mission and identify future requirements relating to it
3. Support groups and communities to consider both internal and external environment identifying their current situation and the likely future, using suitable tools and/or methods
4. Support groups and communities to undertake a risk analysis to inform planning
5. Support groups and communities to identify their options using information gathered
6. Support groups and communities to assess the options identified and plan and prioritise actions to be taken including goals and targets
7. Support groups and communities to develop sound financial management systems
8. Support groups and communities to accurately analyse their financial position and future requirements
9. Support groups and communities to identify and to access a range of possible sustainable income streams
10. Support groups and communities to identify when they need to build capacity to support the generation of additional/diverse income streams
11. Support groups and communities to plan reviews of their financial position and sustainability



Knowledge and Understanding

You need to know and understand the following:

- a) What sustainable funding means
- b) Why sustainable funding is important for groups and communities
- c) The structures of different groups and communities
- d) The possible methods for working with groups and communities
- e) The sources of information and advice available to you
- f) How to analyse the missions of groups and communities
- g) How to use tools and methods available identify developments in the internal and external environments which impact on the work and sustainability of groups and communities
- h) How to undertake a risk assessment for groups and communities
- i) How to use the information available to identify options
- j) How to prioritise options and plan goals and targets
- k) How to develop appropriate financial management systems
- l) How to analyse the financial position of and organisation and identify future requirements
- m) The funding streams available to groups and communities
- n) The alternative sources of finance available to groups and communities
- o) Why it is important for groups and communities to gain a range of income streams
- p) How to build the capacity of groups and communities
- q) How to access the funding streams available to groups and communities
- r) The importance and methods for planning reviews of financial position and sustainability
- s) Your own limits and responsibilities and those of your organisation
- t) What the relevant national, local, professional, and organisational requirements are relating to safeguarding equal opportunities, discrimination, security, confidentiality, and data protection.

Links to other National Occupational Standards

There are other NOS units to which you may wish to refer to develop your knowledge and abilities to a greater depth. Specific units which have been identified are:

Unit Reference	Unit Title	National Occupational Standards (Managing Organisation)
B8	Ensure compliance with legal, regulatory, ethical and social requirements	Management and Leadership (Management Standards Centre)
B11	Promote equality of opportunity and diversity in your area of responsibility	Management and Leadership (Management Standards Centre)
E2	Manage finance for your area of responsibility	Management and Leadership (Management Standards Centre)
HSS 1	Make sure your own actions reduce risks to health and safety	Health and Safety (ENTO)
5	Develop networks to provide access to information, support and resources	Business Support (SfEDI)
F7	Organise events	Management of Volunteers (UK Workforce Hub)
AG19	Undertake research for the service and its clients	Advice and Guidance (ENTO)

There are also other NOS suites to which you may wish to refer to develop your knowledge and abilities to a greater depth in certain topics covered by the development work standards.

They include:

National Occupational Standards Suite	Managing Organisation
Administration	Council for Administration
Advice & Guidance	ENTO
Business Information	SfEDI
Business Support	SfEDI
Coaching & Mentoring	UK Workforce Hub
Community Development Work	LLUK
Fundraising	UK Workforce Hub
Health and Safety	ENTO
Human Resources	ENTO
Learning & Development	Lifelong Learning UK/ENTO
Management & Leadership	Management Standards Centre
Management of Volunteers	UK Workforce Hub
Marketing	Marketing and Sales Standards Setting Body
Prevention & Management of Work-related Violence	ENTO
Trustees	UK Workforce Hub

Further information can be obtained from:

Council for Administration (CfA)
www.cfa.uk.com

ENTO
www.ento.co.uk

Lifelong Learning UK (LLUK)
www.lluk.org

Management Standards Centre (MSC)
www.management-standards.org

Marketing and Sales Standards Setting Body (MSSSB)
www.msssb.org

SfEDI
www.sfedi.co.uk

UK Workforce Hub
www.ukworkforcehub.org.uk

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If you would like to be kept up to date or are interested in finding out more about standards and how they can be used please email your contact details to info@skills-thirdsector.org.uk and we can add you to the mailing list.

The other standards Skills - Third Sector has developed are for Fundraising, Volunteer Managers, Campaigners, Development Workers and Trustees and Management Committee Members.