

# Case Study 1

## Recruitment

A large third sector organisation is about to recruit for new managers. The organisation provides services to adults and children and young people with learning disabilities through the provision of supported living; domiciliary care and residential care. A skills audit within the organisation has identified that they have a gap in relation to operational planning.

Although training is planned, they are keen to ensure that they recruit new managers who have knowledge, understanding, skills and experience in this area.

The National Occupational Standard (NOS) **SCDLMCE5 – Develop operational plans and manage resources to meet current and future demands on the provision of care services** could therefore be used to assist them to identify the knowledge, understanding and skills that can be used within the job description, person specification, interview questions and to measure the competence a person should display during probation.

Please note that this example focuses on the elements that are related to the function of operational planning as part of the job description. The person specification, interview questions and the competence that needs to be shown during probation would be much broader than this function in order to cover other elements of the role. However, you will find that many of the statements and questions can be used to measure other important aspects of the job role e.g. planning, communication, individual participation, performance management etc.

### Job Description

Job descriptions set out the purpose of a job, where the job fits into the organisational structure, the main accountabilities and responsibilities of the role and the key tasks to be performed.

The content of the NOS could be reflected in a key task within the job description for this role as follows:

***'Develop operational plans and manage resources to meet the requirements of the service and the achievement of outcomes for individuals'***

### Person Specification

A person specification outlines the skills that someone will need in order to carry out the job role to an expected standard. The list below is drawn from the performance criteria set out in the NOS and could be used for the person specification:

#### **The Social Care Manager must be able to:**

- Lead the delivery of a service that achieves positive outcomes for individuals
- Promote the vision of the organisation and work in partnership with key stakeholders
- Prioritise objectives, plan and allocate work ensuring the best use of resources & the participation of individuals in the planning process
- Use performance indicators to measure the achievement of positive outcomes for individuals and the service
- Use a range of data collection methods for monitoring and evaluation
- Evaluate and analyse information to make judgements and decisions
- Manage time, resources and workload of self and workers
- Demonstrate an understanding of relevant legislation, statutory codes, standards, frameworks and guidance relevant to services for people with a learning disability
- Ensure that records meet legal and organisational requirements
- Lead practice that supports positive risk taking
- Create a culture that promotes openness, creativity and problem solving

### Interview Questions

Interview questions are designed to allow the employer to evaluate the knowledge, understanding, skills and experience that a candidate possesses, these should relate to the person specification and assess their ability to undertake the job role.

This NOS could be used in the following interview question for the candidate to demonstrate the experience that they have in relation to operational planning and to illustrate the knowledge, understanding and skills that they possess.

#### Part A

'Tell us about a time when you have been involved in operational planning'

#### Part B

'What were the important things to consider?'

### Expected responses

- Clarity of own role and responsibilities
- Understanding of how operational plans link to the vision of the service and the achievement of positive outcomes
- Effective use of resources
- Supporting participation of individuals
- Use of data collection methods
- Ability to evaluate and analyse information
- Ability to prioritise and plan
- Time management
- Performance management
- Leadership skills – motivating others, effective communication, inspiring others, problem solving

### Probationary Period

A probationary period is the period of time within which recruited workers are expected to meet standards set out within the person specification for their role. Some organisations may use different terminology for this, in which case, it would be the requirements and processes of the organisation that are used to confirm new workers in post. In the majority of organisations the probation period would be approximately 6 months. Workers would be expected to meet agreed criteria identified within the person specification rather than all of it during this period of time. The remaining criteria could be measured during on-going performance reviews/appraisals.

**In this example the expected performance criteria that should be met during the probationary period would be:**

P1	Identify own area of responsibility for operational planning
P2	Identify the overall vision of the service provision and the governance within which it operates
P3	Identify the main purpose, aims and objectives of the service provision
P4	Critically evaluate how the vision of the service provision, its purpose, aims and objectives, contribute to the achievement of positive outcomes for individuals
P5	Critically evaluate demographics, trends and changes that are likely to have an impact on the service provision
P6	Appraise options for operational plans in terms of costs, risks, benefits and outcomes
P7	Balance new ideas with tried and tested solutions for operational planning
P8	Lead work with individuals, key people and others to develop an operational plan that is consistent with own area of responsibility
P9	Work towards a clearly defined vision of the future
P10	Articulate a vision for the service provision that generates enthusiasm and commitment
P11	Ensure that individuals, key people and others can see how operational plans link to the overall vision of the service provision and the governance within which it operates
P12	Identify the resources required to achieve the objectives set within the operational plan and to deliver a safe and effective service provision

P13	Ensure that the operational plan is made available to individuals, key people and others in accessible formats
P14	Lead work with individuals, key people and others to identify how the achievement of the operational plan should be measured
P15	Use a range of sources to inform the development of performance indicators
P16	Lead work with individuals, key people and others to develop performance indicators
P17	Identify appropriate data collection methods for the objective measurement of the achievement of operational plans
P18	Agree with individuals, key people and others how they will participate in measuring the achievement of operational plans

Please note that some of these may be dependent on when the new manager has joined the organisation and its cycle of planning. The second section of the NOS outlines the performance criteria needed for a manager to 'Lead and manage the implementation of operational plans and allocate resources within own area of responsibility'. For some managers, this would be more appropriate for measurement during their probationary period. It is important that the job description, the person specification and competencies to be measured during probation are tailored to the need of the organisation.