Unit 205 Manage personal performance and development

UAN:	**L/506/1788**
Level:	2
Credit value:	4
GLH:	18
Relationship to NOS:	Management & Leadership (2012) National Occupational Standards: • CFAM&LAA1 Manage yourself
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to manage personal performance and development. Upon completion of this unit, learners will be able to manage their own performance, time and workload. They will also be able to identify their own development needs and fulfil a personal development plan.

Learning outcome
The learner will: 1. be able to manage personal performance
Assessment criteria
The learner can: 1.1 agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2 agree criteria for measuring progress and achievement with line manager 1.3 complete tasks to agreed timescales and quality standards 1.4 report problems beyond their own level of competence and authority to the appropriate person 1.5 take action needed to resolve any problems with personal performance.

Assessment Guidance

1.1

Objectives are targets to be implemented or completed, or standards of performance to be achieved and maintained.

Objectives provide focus and clear direction, and should be SMART:

- Specific: Clear, unambiguous, straightforward, understandable
- Measurable: Related to quantified or qualitative performance measures
- Achievable: With known resources
- Realistic: Linked to business needs
- Time-bound: Building-in completion date and review dates

In this criterion the learner is required to provide evidence that he or she has:

- identified the relevant business needs of the organisation and agreed this with their line manager
- agreed appropriate and correct SMART objectives with their line manager that support those business needs

1.2

It is important and necessary to measure, or monitor, progress towards objectives with the line manager for a variety of reasons:

- It provides information to see if objectives are being achieved
- It enables any adjustments or improvements to the task to be carried out if they are required
- Monitoring performance with the line manager will provide valuable information for a 'two-way' appraisal or performance review.

The criteria used for measuring progress and achievement will depend upon the SMART objectives, and these criteria will need to be agreed with the line manager.

In this criterion the learner is required to provide evidence that he or she has agreed appropriate and correct criteria for measuring progress towards, and achievement of, SMART objectives with his or her line manager.

1.3

All tasks should be completed within the timescale agreed and to the quality standard required.

Other quality standards make reference to 'conformance with requirements', but the basis of all the definitions of 'Quality' is that the features affecting quality are capable of being tested and are thus objective measures of performance.

In this criterion the learner is required to provide evidence that tasks have been completed to agreed timescales and that they have also

been completed to agreed and objective (or measurable) quality standards.

1.4

'Competence' is the ability of an individual to carry out a task properly to the required standard, whilst 'authority' allows its holder to act in certain ways designated by the organisation and to directly influence the actions of others through instructions.

Authority may be:

- Line Authority - reflects the organisational hierarchy
- Staff authority - the right to advise or assist those who possess line authority as well as other staff personnel
- Functional Authority - given to individuals who, in order to meet responsibilities in their own areas, must be able to exercise some control over organisation members in other areas.

In this criterion the learner is required to provide evidence that problems that are beyond both their own level of competence **and** their authority have been reported to the appropriate person.

1.5

Problems with personal performance may arise for a variety of reasons, such as:

- Unfair or unclear expectations as to the task or the individual's role
- Medical issues
- Personal or family issues
- Job dissatisfaction
- Workplace conflict
- Inadequate knowledge or skills
- etc.

It is necessary to get to the root cause of any problem with personal performance, and to ensure that the action taken to resolve the problem is appropriate and within the organisation's guidelines, policies and procedures, if applicable.

In this criterion the learner is required to provide evidence that the root cause of any problems with personal performance is identified, and that appropriate action is taken to resolve the problems.

Learning outcome
The learner will: 2. be able to manage their own time and workload
Assessment criteria
The learner can: 2.1 plan and manage workloads and priorities using time management tools and techniques 2.2 take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives 2.3 explain the benefits of achieving an acceptable "work-life balance"

Assessment Guidance

2.1

Examples of time management tools and techniques include:

- Covey Time (Task) Management Matrix
- 'To-do' list (monthly, weekly, daily)
- Scheduling tasks and activities
- Diary, paper-based or electronic
- Bespoke time-management documentation or software
- etc.

In this criterion the learner is required to provide evidence that he or she is managing workloads and priorities using appropriate time management tools and techniques.

2.2

Distractions that are likely to limit the effective management of time and the achievement of objectives include:

- Telephone interruptions
- Colleagues dropping in without appointments
- Meetings, both scheduled and unscheduled
- Lack of objectives, priorities, and deadlines
- Cluttered desk and personal disorganisation (not having the tools/resources/supplies at your disposal)
- Involvement in routine and detail that should be delegated to others
- Unclear, or lack of, communication and instruction
- Inability to say 'no'
- etc.

In this criterion the learner is required to provide evidence that he or she has taken appropriate action to minimise the effects of workplace distractions that are likely to limit the effective management of time and the achievement of objectives.

2.3

There are benefits to the employer and to the employee from achieving an acceptable "work-life" balance.

Employer benefits include:

- reduced staff turnover
- lower recruitment and training costs, due to decreased turnover
- reduced absenteeism due to higher levels of well being
- gaining a reputation as a good employer or an employer of choice
- better attraction and retention of staff
- reduced stress levels amongst staff
- improved morale and job satisfaction
- greater staff loyalty and commitment
- improved productivity

Employee benefits include:

- a reduction in the impact of work on home and family life and vice a versa
- reduced stress levels and higher levels of well being
- control over time management in meeting work-life commitments
- autonomy to make decisions regarding work-life balance
- increased focus, motivation and job satisfaction knowing that family and work commitments are being met
- increased job security from the knowledge that an organisation understands and supports workers with family responsibilities

In this criterion the learner is required to **explain** how benefits for the employee or for the employer follow from having an acceptable "work-life balance"; it is not acceptable to merely list a number of benefits.

Learning outcome
The learner will: 3. be able to identify their own development needs
Assessment criteria
The learner can: 3.1 identify organisational policies relating to personal development 3.2 explain the need to maintain a positive attitude to feedback on performance 3.3 explain the potential business benefits of personal development 3.4 identify their own preferred learning style(s) 3.5 identify their own development needs from analyses of the role, personal and team objectives 3.6 use feedback from others to identify their own development needs 3.7 agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs.

Assessment Guidance

3.1

Organisational policies relating to personal development will vary, depending upon the type and nature of the organisation.

Examples include:

- Staff Development Policy
- Training and Development Policy
- Professional Development Policy
- Organisational and Professional Development Policy
- etc.

In this criterion the learner is required to identify organisational policies relating to personal development.

3.2

Feedback is important to keep colleagues informed as to how well they are doing and to help them improve.

Properly given, feedback should be about performance, not personality, so the individual receiving the feedback should not allow emotions to be part of his or her reaction to feedback: a positive attitude is required in order to listen carefully to what is being said, to take the time to consider the value of the feedback, and to ask the person giving the feedback on how you can improve.

In this criterion the learner is required to describe what is meant by a positive attitude in order to then explain why it is necessary to maintain a positive attitude to feedback on performance.

3.3

'Personal development' is taken here to include 'professional development' in the sense of undertaking personal development to build human capital, skills and knowledge.

The potential business benefits of personal development include:

- improved workplace performance
- linking training and development activities to business needs and career development
- identifying talent and potential in the organisation
- improved staff morale and motivation
- introducing fresh ideas in the organisation
- linking training and development to SMART objectives and performance management
- etc.

In this criterion the learner is required to describe what is meant by personal development in order to then explain potential business benefits of personal development; it is not sufficient to merely list potential business benefits.

3.4

Individuals differ in how they learn, and there are a number of learning styles models that can be used to identify an individual's learning style, perhaps the most widespread being the Honey and Mumford adaptation of Kolb's experiential model:

- Activist
- Reflector
- Theorist
- Pragmatist

In this criterion the learner is required to provide evidence that he or she has correctly identified their own learning style using an appropriate model.

3.5

Analysing own role and personal and team objectives is undertaken in order to identify the future development needs that are required to acquire the skills and knowledge for career development and for effective performance in the workplace both now and in the future.

Use will be made of internal documents such as job description, person specification, personal development plans, business plans, team plans and objectives, etc., and relevant documents will be analysed to identify development needs.

In this criterion the learner is required to analyse relevant documents, where available, relating to own role and personal and team objectives in order to identify own development needs.

3.6

Feedback from others is important in identifying development needs as good feedback enables individuals and groups to be aware of what they do and how they do it, and helps individuals learn, grow and develop.

Feedback may be formal, as in a performance review, or it may be informal, as in on-going advice or observations given outside the formal process.

In this criterion the learner is required to provide evidence that he or she has used examples of formal or informal feedback from others to identify development needs.

3.7

Having identified development objectives from feedback and analysing own role and personal and team objectives, the next step is to turn them into SMART objectives that are agreed with the appropriate manager or supervisor.

In this criterion the learner is required to provide evidence that appropriate and correct SMART development objectives that align with organisational and personal needs are agreed with the appropriate manager or supervisor.

Learning outcome
The learner will: 4. be able to fulfil a personal development plan
Assessment criteria
The learner can: 4.1 agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms 4.2 make use of formal development opportunities that are consistent with business needs 4.3 use informal learning opportunities that contribute to the achievement of personal development objectives 4.4 review progress against agreed objectives and amend plans accordingly 4.5 share lessons learned with others using agreed communication methods.

Assessment Guidance
4.1 The SMART objectives should now form part of an agreed personal development plan that sets out what needs to be done and how it is to be done, and provides details of the resources required, the timescales, and the review mechanisms. In this criterion the learner is required to provide evidence that he or she has agreed a correct and appropriate personal development plan that specifies actions, methods, resources, timescales and review mechanisms. **4.2** Formal development takes place in an organised and structured setting with explicit learning outcomes and objectives, and typically leads to certification or some other recognition that it has been completed to a certain standard. In this criterion the learner is required to provide evidence that he or she has made use of formal development opportunities that are consistent with business needs. **4.3** Informal learning results from daily activities related to work, family or leisure, and is not organised or structured in terms of learning outcomes and objectives. In this criterion the learner is required to provide evidence that he or she has used informal development opportunities that contribute to the achievement of personal development objectives.

4.4

Agreed objectives and review mechanisms are addressed in assessment criteria 3.7 and 4.1.

In this criterion the learner is required to provide evidence that he or she has correctly and appropriately reviewed progress against agreed objectives and amended plans accordingly.

4.5

Reflecting on personal development provides an opportunity to ask such questions as 'What went well?', 'What didn't go well?', and 'What would I do differently next time?'

Sharing 'lessons learned' with others enables successes to be built upon and previous mistakes to be avoided, and may take place, for example, in a performance review or appraisal interview, a learning community, or as part of a review of a development activity.

In this criterion the learner is required to provide evidence that he or she has shared lessons learned from own personal development with others using agreed communication methods.