PCER GUIDANCE NOTES
Leadership and management

Leadership and management

Unit PC9 – Recruit and develop people

This unit relates to the role of recruiting and developing people. You are expected to play a part both in analysing personnel needs and recruiting people to fill staff shortages. As well as recruiting staff, you are also expected to ensure that both you and your staff are competent to provide high quality services to the organisation. This is an ongoing responsibility and you should constantly monitor your own and other peoples' performance.

Element reference	Demonstrated behaviour and examples
Element 20 **Identify personnel requirements and role specifications**	Identify recruitment needs in terms of skills gaps and staff shortages
	Evaluate the resource constraints against the benefits of bringing new staff in Produce clear and concise job descriptions for identified gaps
	Prepare person specifications identifying specific skills and competences required
	Provide information about staff shortages and job descriptions to relevant personnel
Element 21 **Select teams and individuals**	Reviewing applications received for a post
	Being part of an interview process
	Use appropriate selection methods to select individuals based upon agreed selection criteria
	Ensure consistency with legal and organisational requirements Ensure equality of opportunity and record the selection process
	Judge information obtained from candidates and make recommendations on the recruitment and selection of personnel
	Make recommendations for improvements in the selection process to the appropriate person
Element 22 **Develop teams and individuals**	Make assessments of the work performed by teams and individuals
	Identify the competences, qualifications and attributes of teams and individuals Identify staff training and development needs
	Identify and organise activities to meet development needs
	Monitoring performance after training
	Provide feedback to individuals and the team on the way learning has impacted on their performance

Please click **here** to see an example of confirmation statements relating to leadership and management.

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Unit PC10 – Lead others to achieve objectives

This unit involves leading a team to achieve work objectives. Each of the three elements in the module requires you to work closely with a team and individuals. In order to achieve the unit you will need a high level of motivational skills and be able to delegate effectively and provide coaching and feedback both to teams and individuals.

Element reference	Demonstrated behaviour and examples
Element 23 **Identify and agree objectives and methods to deliver required outcomes**	Agree methods and objectives with the team in order to achieve the required outcomes Enable team members to have an input into the planning of the work and the objectives and gain their commitment to its achievement Ensure that the agreed methods and objectives are consistent with organisational values and expectations Ensure that methods and objectives are compliant with legal requirements Ensure that chosen methods and objectives optimise the use of resources
Element 24 **Delegate activities to teams and individuals**	Define the responsibilities and limits of authority for teams and individuals Allocate work to meet objectives in accordance with the abilities and development needs of the individual Provide learning opportunities to team members where appropriate Provide sufficient information to enable them to complete the activities and agree access to and levels of support Agree deadlines, resources and any reporting requirements with team members
Element 25 **Monitor and appraise the work of others**	Monitor the team's and the individual's performance against objectives Provide feedback in an appropriate and timely manner Offer suggestions and encouragement to the team and individuals for improving performance Reschedule or reallocate work to achieve objectives Discuss the need for further learning where monitoring reveals performance gaps

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I analysed the firm's staffing capacity and agreed with the partners that we needed to recruit three members of staff. I prepared job specifications for each role and placed these on LinkedIn and ACCA Careers. For the junior roles I was able to engage a local training provider offering apprenticeship placements.

I created some basic numeracy tests for the junior positions and a more complex audit scenario for the senior position, in addition to a competency-based interview which I undertook. I narrowed down the candidates to two final interviewees for each position for the partner to interview. I contacted the successful candidates to offer the positions. This was a very useful exercise as it was my first step into recruitment and selection. As our firm specialises in medical and dental clients, I was faced with several assignments involving superannuation. As the current team had not had much experience of this, I sought a colleague from our tax team to help me train staff in this area. I arranged a training session to discuss the basics followed by work shadowing.

I review all files completed to ensure compliance with reporting requirements, providing feedback to staff where required, and advising them of any development needs which are included in their quarterly objectives at their next performance meeting. This was very useful as I was able to increase our capacity to take on more medical and dental clients going forward as staff were now more capable on the assignments with less supervision.

Effective leadership is an important part in my role as senior manager.

- I reviewed CVs and selected candidates to take to interview for some positions that we had advertised, I was involved in the interview process and prepared a list of questions and a skill test for the applicants. This varied depending on the role.

- I recently started to delegate more complex tax computations to a member of the team who had expressed an interest in learning more in this area. I provided training to the team member and ensured they had everything they needed to move forward with these computations. I also suggested some courses which would be beneficial. I continued to support them by reviewing their draft computations.

- I had to have a difficult conversation during an appraisal recently where a staff member wasn't performing as expected which was unlike them. It came to light they were having some personal issues which they initially didn't want to share., I explained to them the importance of open communication, and anything discussed would remain confidential. I also explained that while I was sympathetic to their situation, it was starting to have a detrimental effect on the rest of the team, which they hadn't realised. We agreed a plan to move forward and after our conversation I noted an improvement in the employee's communication with myself and their performance was back to the level expected.