
Overview

This standard covers the competences you need to prepare and manage budgets for scientific or technical workplace activities, in accordance with approved procedures and practices.

You will be required to demonstrate that you can prepare, submit and agree a budget for a set period. This will involve monitoring actual performance against the agreed budget.

You will take the necessary action in response to any identified variances and unforeseen developments in accordance with workplace procedures.

The activity is likely to be undertaken by someone in a science related work setting, including individuals working in hospitals, scientific laboratories, schools and universities.

Performance criteria

You must be able to:

P1 ensure that your work is carried out in accordance with workplace procedures

P2 use safe practices and the appropriate personal protection equipment (PPE) where scientific or technical activities are performed

P3 identify and agree the business and scientific or technical requirements of your role in the workplace

P4 establish processes that deliver scientific or technical outcomes based on organisational goals and aims

P5 evaluate available information and consult with others to prepare budget plans for activities

P6 submit proposed budgets to the relevant people in the organisation, for approval and to assist the overall planning process

P7 use the agreed budget plans to start, monitor and control delivery of scientific or technical activities

P8 evaluate variances between what was planned in the budget and what actually happened in the workplace

P9 take prompt corrective action, obtaining agreement from the relevant people if required, to delivery the critical budget outcomes

P10 propose revisions to the budget plan, 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

P11 provide ongoing information on performance against the budget plan to relevant people in your organisation

P12 gather information from implementation of the budget plan to assist in the preparation of future project plans

P13 present the results of the work done to the appropriate people, in accordance with departmental and organisational procedures

Knowledge and understanding

You need to know and understand:

K1 the health and safety requirements of the area in which you are carrying out the scientific or technical activities

K2 the implications of not taking account of legislation, regulations, standards and guidelines when conducting scientific or technical activities

K3 the scientific or technical techniques and processes you must use correctly in the workplace.

K4 the importance of wearing protective clothing, gloves and eye protection for scientific or technical activities

K5 the importance of correct identification, and any unique workplace coding system

K6 the organisational requirements for maintaining the security of the workplace and keeping confidential documents

K7 the workplace business aims and goals and the planning process

K8 the workplace organisational structure, its values and culture

K9 how your scientific or technical activities add value through delivering workplace products, services and processes

K10 the lines of communication and responsibilities in your department, and the links with the rest of the organisation

K11 the limits of your own authority and to whom you should report if you have problems that you cannot resolve

K12 how to identify and assess the scientific or technical requirements of your work role

K13 the different ways in which you are set your agreed personal work objectives

K14 the different perspectives and approaches that are important when exercising autonomy or judgement about scientific or technical activities used

K15 the types of investigation initiated and used to review

the effectiveness or appropriateness of methods, action and results of your scientific or technical work

K16 the budget responsibilities, including the limits of your authority, for your workplace role

K17 the budget information available in your organisation

K18 the scientific or technical activities for which budgets have been allocated

K19 the budgeting period(s) used in your workplace

K20 the workplace procedures for the preparation and approval of budgets

K21 the workplace procedures for monitoring and reporting of performance against existing and revised budgets

K22 the workplace systems established for managing and evaluating performance against budgets

K23 the people in the workplace who need information on the financial performance of your area

K24 the procedures for presenting financial information and the timescales/deadlines for delivering this information

Scope/range

1. discuss and agree budgets with one of the following people:
 - 1.1 manager
 - 1.2 head of school
 - 1.3 vice principal
 - 1.4 director
 - 1.5 head teacher
 - 1.6 principal
2. agree business and scientific or technical work objectives that are all the following:
 - 2.1 specific
 - 2.2 achievable
 - 2.3 time-bound
 - 2.4 measureable
 - 2.5 realistic
3. establish and use effective methods for all of the following:
 - 3.1 keeping staff informed of budget plans and developments
 - 3.2 specifying what is expected of team leaders and their staff and their accountabilities
 - 3.3 monitoring the budgets for scientific or technical work and progress against workplace plans and take appropriate corrective action, where necessary
 - 3.4 details that are critical to monitoring budgets and achieving successful business results
 - 3.5 identifying common budgeting issues and trends and their impact upon current and future spending
4. record details of the work activities, and communicate the details to the appropriate people, using:
 - 4.1 verbal report plus one method from the following:
 - 4.2 written or typed report
 - 4.3 computer-based record
 - 4.4 specific workplace documentation
 - 4.5 electronic mail

COGST3-07

Prepare and manage budgets for scientific or technical workplace activities



Developed by	Cogent
Date Approved	01 Nov 2023
Indicative Review Date	01 Nov 2027
Validity	Current
Status	Original
Original URN	COGLATA4-08
Relevant Occupations	Professional Occupations, Science, Science and Mathematics Science, Science Professionals
Suite	Laboratory and Associated Technical Activities Suite 4 2010, Scientific Technology Suite 3
Keywords	laboratory, technical, LATA, prepare, budgets, scientific, workplace, manager, verbal report, measurable, specific
