**LEARNER GUIDE**

**Identify expertise and resources**

Unit Standard 252195

Level 4 Credits 3

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PERSONAL INFORMATION

|  |  |
| --- | --- |
| **NAME** |  |
| **CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |
| **Learner Number** |  |
| **Identity Number** |  |
|  |
| **EMPLOYER** |  |
| **EMPLOYER CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Supervisor Name** |  |
| **Supervisor Contact Address** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |

INTRODUCTION

#### Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!



This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!

Structure

### Programme methodology



The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

* Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises
* As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter’s solutions to the problems
* Through participation and interaction the learners can learn as much from each other as they do from the course presenter
* Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding
* Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

#### Different role players in delivery process

* Learner
* Facilitator
* Assessor
* Moderator

### What Learning Material you should have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

|  |  |
| --- | --- |
| **Learner Guide** | **This learner guide is your valuable possession:**This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes. During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills. Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred by sharing!This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you! |
| **Formative Assessment Workbook** | The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt. The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually.You are required to complete all activities in the Formative Assessment Workbook. The facilitator will assist, lead and coach you through the process.These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding.  |

### Different types of activities you can expect

To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.



The table below provides you with more information related to the types of activities.

| **Types of Activities** | **Description** | **Purpose** |
| --- | --- | --- |
| **Knowledge Activities** | You are required to complete these activities on your own.  | These activities normally test your understanding and ability to apply the information. |
| **Skills Application Activities** | You need to complete these activities in the workplace  | These activities require you to apply the knowledge and skills gained in the workplace |
| **Natural Occurring Evidence** | You need to collect information and samples of documents from the workplace. | These activities ensure you get the opportunity to learn from experts in the industry.Collecting examples demonstrates how to implement knowledge and skills in a practical way |

### Learner Administration



#### Attendance Register

You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

#### Programme Evaluation Form

On completion you will be supplied with a “Learning programme Evaluation Form”. You are required to evaluate your experience in attending the programme.

Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

### Assessments

The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners’ ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.



**How will Assessments commence?**

#### Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

#### Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

### Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.



Please remember that this Skills Programme is based on outcomes based education principles which implies the following:

* You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
* Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.
* The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
* You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
* If you need assistance please contact your facilitator who will gladly assist you.
* If you have any special needs please inform the facilitator

### Learner Expectations

Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners



|  |
| --- |
| Your name:  |
|  |
|  |
| The organisation you represent:  |
|  |
|  |
| Your position in organisation:  |
|  |
|  |
| What do you hope to achieve by attending this course / what are your course expectations? |
|  |
|  |
|  |
|  |
|  |

# UNIT STANDARD 252195

#### Unit Standard Title

Identify expertise and resources

#### NQF Level

4

#### Credits

3

#### Purpose

The person credited with this unit standard will be able to determine criteria for expertise and resources and establish the recording of these resources. They will be able to report on the recording of these resources and expertise.

The qualifying learner is capable of:

* Determining criteria for expertise and resources.
* Establishing and recording expertise and resources.
* Reporting on expertise and resources.

#### Learning Assumed To Be In Place And Recognition Of Prior Learning

Learners accessing this unit standard will have demonstrated competence in:

* Communicating at NQF Level 3 or equivalent.
* Mathematical Literacy at NQF Level 3 or equivalent.

#### Unit Standard Range

* Marketing including all forms of marketing communications, direct marketing and relationship marketing, sponsorship, event marketing, sales promotions, public relations and alternative strategies.
* Standard applies to marketing management, customer management, marketing communications and marketing research.
* Reporting methods including format, frequency, timing, layout and medium.

#### Specific Outcomes and Assessment Criteria:

**Specific Outcome 1**

Determine criteria for expertise and resources.

**Assessment Criteria**

* Expertise and resource needs are identified in terms of the competencies and attributes required.
* Estimates of resource needs are produced for a marketing project.
* Expertise and resource needs are confirmed with key persons and authorised within scheduled time frames.
* Expertise and resource criteria are drawn up to inform resource acquisition.

**Specific Outcome 2**

Establish and record expertise and resources.

**Assessment Criteria**

* Processes for the establishment of expertise are drawn up so as to comply with established procedures and to support the organisation's objectives.
* Expertise and resources are chosen to best expresses the needs, operations and service requirements of the organisations.
* Expertise and resources are documented in the required format and within agreed time frames.

**Specific Outcome 3**

Report on expertise and resources.

**Assessment Criteria**

* The reporting method appropriate to the context and organisational requirement is selected.
* Report is prepared using data recorded and in accordance with organisational requirements.

#### Unit Standard Accreditation And Moderation Options

* An individual wishing to be assessed (including through RPL) against this unit standard may apply to an assessment agency, assessor or provider institution accredited by the relevant ETQA.
* Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
* Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
* Moderation of assessment will be conducted by the relevant ETQA at its discretion.

#### Unit Standard Essential Embedded Knowledge

A demonstrated understanding of:

* Principles, methods and techniques for identifying expertise and resources.

#### Critical Cross-field Outcomes (CCFO):

**Unit Standard CCFO Identifying**

Identify and solve problems pertaining to the determination of expertise and resources.

**Unit Standard CCFO Working**

Work effectively with others in the establishment of expertise and resources.

**Unit Standard CCFO Organising**

Organise oneself and one's activities so that alternative criteria exist in the identification of expertise and resources.

**Unit Standard CCFO Collecting**

Collect, evaluate, organise and critically evaluate information to ensure accurate decisions are made in the identification of expertise and resources.

**Unit Standard CCFO Science**

Use science and technology in the recording of evidence of expertise and resources.

**Unit Standard CCFO Contributing**

Being culturally sensitive across a range of social contexts when determining expertise and resources to limit the risk of dispute and so that it is acceptable to individual with varying cultural backgrounds.

# DETERMINE CRITERIA FOR EXPERTISE AND RESOURCES

#### ***Specific Outcome 1***

Determine criteria for expertise and resources.

#### ***Assessment Criteria***

* Expertise and resource needs are identified in terms of the competencies and attributes required.
* Estimates of resource needs are produced for a marketing project.
* Expertise and resource needs are confirmed with key persons and authorised within scheduled time frames.
* Expertise and resource criteria are drawn up to inform resource acquisition.

## Employee Expertise

Organisations have requirements to fill positions with employees who can function in a job role, according to the requirements of the position. In organisations, employees are selected to fill certain positions. They are selected amongst a variety of applicants who are of the opinion that they are qualified and have sufficient experience to fill the position. So we have a need in organisations for employees to fill the position, but we need to select a couple of criteria to determine what the requirements are for the applicants, before starting the selecting process.

Let’s take the example of filling a position for a receptionist position in a large company. Once we know the setting, let’s take a look at the requirements of the person, in order to competently function in the role they need to fill (their job function). They must be able to:

* Welcome customers and notify the appropriate person that they have a customer
* Answer the telephone and direct the call according to the requirements of the caller
* Monitor and maintain the reception area according to the organisational requirements
* Handle incoming and outgoing mail for the employees of the organisation

In order to complete the above in the organisation, the applicant must have certain technical competencies and personal attributes. Without these, although the person may have the experience, they may not be able to function in the position according to the needs of the company. Firstly, the technical competencies of the applicant should include the following:

* Able to operate the PABX system accordingly
* Make telephone calls as instructed by the employees of the organisation
* Handle the fax machine for incoming and outgoing faxes
* Place calls on hold and then transfer them to the appropriate extension
* Computer literate

Then they need to have personal attributes:

* They must be friendly, welcoming and always of assistance to customers and callers
* Properly presented
* Good time management skills
* Fluency in the English spoken and written language

Now let’s take a look at some one in the Administration section of an organisation:

Core competencies required in Administration and Secretary Jobs include:

* Excellent communication skills
* Planning and Organising
* Time Management
* Ability to achieve results
* Problem Solving
* Computer Literacy

For Administration positions, you should have the following personal attributes:

* ability to motivate and develop a team
* ability to build relationships
* manage a large department
* manage a building or property
* plan and develop strategy

In order to establish these competencies, during the interviews with prospective employees, the following questions can be raised:

Question 1: 'Identify a time when you successfully conveyed your ideas to an individual or group so that they were able to understand and retain your message.'

Question 2: 'How do you manage your own time and objectives?'

Question 3: 'Describe a situation where you were required to gather a large amount of data, to analyse it objectively and to make a decision or a recommendation based on the results.'

Question 4: 'Describe a time when you had to work exceptionally hard to provide great service to a customer or client. What did you do and what was the outcome.'

Question 5: 'Give an example of the different approaches you have used when persuading your team, colleagues or manager to agree with your views.'

Question 6: 'Describe a time when you had to build a collaborative relationship either within your department or outside in order to achieve a particular goal. What steps did you take to ensure this was a success?'

As an interviewer, once you have asked these questions and you have checked the applicant’s listed technical competencies, and personal attributes, you will be able to make an informed decision with regards to their ability to perform in the function you require.



### Organisational Resources

All organisations require resources (people, money and time) to complete their business activities in order to ultimately, make a profit and continue existing as an organisation. We have just looked at the competencies required by a member of staff. Now let’s take a look at the resources required, but more specifically, equipment requirements.

When the organisation grows to such an extent where a fax machine, copier and printer is required by each employee, the organisation may decide to rather purchase one high volume, multi-functional item rather one for each of the staff members. This may prove less costly in the long run as there is only one printer to maintain. Rather than purchasing cartridges and paper for a multitude of printers and copiers and a fax machine, one multi-functional machine is more cost effective.

After doing some investigation into the cost of running the various machines as well as their purchase/rental prices, it will most certainly be more cost effective to make use of one centralised unit.

# ESTABLISH AND RECORD EXPERTISE AND RESOURCES

#### ***Specific Outcome 2***

Establish and record expertise and resources.

#### ***Assessment Criteria***

* Processes for the establishment of expertise are drawn up so as to comply with established procedures and to support the organisation's objectives.
* Expertise and resources are chosen to best expresses the needs, operations and service requirements of the organisations.
* Expertise and resources are documented in the required format and within agreed time frames.

## Employees

Establishing the expertise of employees for a specific organisation requires the needs of the organisation to be identified. When this is related to the filling of positions within the organisation, it is more often than not a job description that is turned to. The job description document will tell you more about the requirements of the position and the attributes that the person requires to fill the position.

First, let's look at some terms. A **job** is a collection of tasks and responsibilities that an employee is responsible to conduct. Jobs have titles. A **task** is a typically defined as a unit of work, that is, a set of activities needed to produce some result, e.g., vacuuming a carpet, writing a memo, sorting the mail, etc. Complex positions in the organisation may include a large number of tasks, which are sometimes referred to as **functions**.

**Job descriptions** are lists of the general tasks, or functions, and responsibilities of a position. Typically, they also include to whom the position reports, specifications such as the qualifications needed by the person in the job, salary range for the position, etc.

Job descriptions are usually developed by conducting a **job analysis**, which includes examining the tasks and sequences of tasks necessary to perform the job. The analysis looks at the areas of knowledge and skills needed by the job. Note that a **role** is the set of responsibilities or expected results associated with a job. A job usually includes several roles.

Typically, job descriptions are used especially for advertising to fill an open position, determining compensation and as a basis for performance reviews. Not everyone believes that job descriptions are highly useful. Once the job roles and functions has been established and described, they will be filed with the Human Resources department and kept on file for future references and hiring requirements.

# Employee Job Descriptions: Why Job Descriptions Make Good Business Sense

## Five Tips about Employee Job Descriptions

**Michelle Embower**

Effectively developed, employee job descriptions are communication tools that are significant in your organisation's success. Poorly written employee job descriptions, on the other hand, add to workplace confusion, hurt communication, and make people feel as if they don't know what is expected from them.

Employee job descriptions are written statements that describe the duties, responsibilities, required qualifications, and reporting relationships of a particular job. Employee job descriptions are based on objective information obtained through job analysis, an understanding of the competencies and skills required to accomplish needed tasks, and the needs of the organization to produce work.

Employee job descriptions clearly identify and spell out the responsibilities of a specific job. Employee job descriptions also include information about working conditions, tools, equipment used, knowledge and skills needed, and relationships with other positions.

Are you still uncertain about the value of employee job descriptions? Consider these tips about employee job descriptions.

**Positives about Employee Job Descriptions**

**Employee job descriptions provide an opportunity to clearly communicate your company direction and they tell the employee where he or she fits inside of the big picture.**
Whether you're a small business or a large, multi-site organisation, well-written employee job descriptions will help you align employee direction. Alignment of the people you employ with your goals, vision, and mission spells success for your organization. As a leader, you assure the inter-functioning of all the different positions and roles needed to get the job done for the customer.

**Employee job descriptions set clear expectations for what you expect from people.**
According to Ferdinand Fournies in this is the first place to look if people aren't doing what you want them to do. He says you need to make certain that they clearly understand your expectations. This understanding starts with the employee job description.

**Employee job descriptions help you cover all your legal bases.**
As an example, for compliance with the, you'll want to make certain the description of the physical requirements of the job is accurate.

**Whether you're recruiting new employees or posting jobs for internal applicants, employee job descriptions tell the candidate exactly what you want in your selected person.**

Clear employee job descriptions can help you select your preferred candidates and address the issues and questions of those people who were not selected.

**Well-written employee job descriptions help organization employees, who must work with the person hired, understand the boundaries of the person's responsibilities.**
People who have been involved in the hiring process are more likely to support the success of the new employee or promoted co-worker. Developing employee job descriptions is an easy way to involve people in your organization's success.

That said, for an effective organisation in this decade, employee job descriptions can slow you down. Employee job descriptions can strangle your success and put people back into the organisational chart boxes you've been asking them to break out of for years.

The goal? Employee job descriptions that provide the positive impact discussed in the first part of this article, without these potential negatives. You can create the balance that allows employee job descriptions to inform, communicate, and align performance without damaging your speed, flexibility, and forward motion.

As you develop employee job descriptions, recognise that they are one component in an effective performance management system. Consider these warnings about employee job descriptions.

**Negative Potential of Employee Job Descriptions**

Employee job descriptions have their downside, too. Use these ideas to identify the negative aspects of employee job descriptions - and turn them into positives.

**Employee job descriptions become dated as soon as you write them in a fast-paced, changing, customer-driven work environment.**

You must supplement employee job descriptions with regularly negotiated goals and developmental opportunities, at a minimum, quarterly, preferably monthly. This requires the employee to meet with the boss or the team to establish the next set of specific, measurable objectives.

This meeting must also be realistic. If the employee receives new goals and is still responsible for every task listed on the original employee job descriptions, this is unfair.

Especially, if the goals and job accomplishments are tied to salary or bonus, you must take a look at where the employee is investing his time. If the employee job descriptions provide a wrong picture, change the employee job descriptions.

**Make certain employee job descriptions have enough flexibility so individuals can "work outside of the box."**

And, no, don't equate "other duties as assigned by the manager," with creative thinking. Employee job descriptions must be flexible so that employees are comfortable cross-training, helping another team member accomplish a task, and confident they can make appropriate decisions to serve their customers.

You want people who are comfortable taking reasonable chances and stretching their limits. You don't want to encourage people to think, "That's not my job."

**Poorly-written employee job descriptions can serve as evidence of wrong-doing or wrong-telling in a wrongful termination lawsuit.**

According to Dr. John Sullivan, an internationally-known HR expert, there are many reasons to stop doing employee job descriptions. These include the fact that most are vague, un-measurable, untimely, and unused.

**For effectiveness, you must regularly look at and use employee job descriptions as part of your day-to-day work.**

In addition to the updating of regular goals and objectives suggested above, employee job descriptions are an integral part of the performance management and evaluation system. They are used to determine salary increases and bonus eligibility.

**Employee job descriptions that sit unused in a drawer, or worse, filed in the HR office, are a waste of time; they must be integral in your hiring process.**

Take the actions discussed in the first part of this article, and make employee job descriptions an integral part of your hiring and selection process.

Use employee job descriptions to obtain employee ownership and support for the position and to trace the parameters of the skills and abilities you seek for the position. In hiring, well-written employee job descriptions can help you make good hiring decisions. And hiring the right team is critical for your future success.

### Equipment

Office equipment requirements are established according to the size and requirements of the organisation. These requirements will change from one office setting to another, as the various organisations have different methods of conducting business.

All equipment in the office must be kept logged in the equipment register where the make, model, serial number and area of operation (i.e. Ben’s Office) is listed. This helps to keep track of all the equipment in an office and to ensure that the equipment can be accounted for where and when required.

Because there is such a vast difference in layout of offices, and the use of office equipment in these offices, we are going to try an exercise of one central office where equipment is required. On the next page there is a picture of an office layout. You will be required to equip the office with the necessary equipment.

But because there is such a vast variety of business enterprises, you have been given carte blanche with regards to the type of operation you need to equip. It can be anything from a sports manager’s office, to that of a lawyer, banker or even the president.

Once you have completed equipping the office, you must complete the equipment registry, by naming all the equipment you have decided upon, as well as their model and serial numbers, the areas where they have been designated to and lastly what their prices are.

To do this you need to get hold of your company’s asset register and then attach it to the manual once you have completed it.

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# REPORT ON EXPERTISE AND RESOURCES

#### ***Specific Outcome 3***

Report on expertise and resources.

#### ***Assessment Criteria***

* The reporting method appropriate to the context and organisational requirement is selected.
* Report is prepared using data recorded and in accordance with organisational requirements.

## Employees

Reporting on employees can be done in many ways, ranging from customer feedback forms through employee appraisals to performance appraisals.

### The Performance Appraisal

#### A. Managers should:

1. Translate organisational goal into individual job objectives and requirements

2. Communicate their expectations regarding employee performance

3. Provide feedback to the employees

4. Coach the employees on how to achieve job objectives and requirements

5. Diagnose the employee’s relative strengths and weaknesses

6. Determine a development plan for improving job performance, and ability utilisations

#### B. Employees should get the answers to:

1. What am I expected to do?

2. How well am I doing?

3. What are my strengths, weaknesses?

4. How can I do a better job?

5. How can I contribute more?

#### C. The Company should:

1. Provide employees with a clear understanding of what is expected of them; establish direction; set objectives and priorities, monitor results, respond to problems and give help and support to ensure that all assigned objectives are met on time.

All employee reports and correspondence must be kept with the Human Resource Department of HR Officer. This ensures that the required data of employees are kept safe and secure at all times and that it can be called upon where and when required doing so by certain members of staff. As part of the monthly meetings, management must give the HR department sufficient time to raise their concerns about the staff and any issues regarding staff.

### Equipment

Equipment records will be kept in the office managers’ office, together with the maintenance procedures and records. This ensures that there is centrality of records as well as to assist in the event of breakages or malfunctioning.

Mostly, records of items kept in the office will portray their purchase date, any manuals and operating instructions etc. More so, the requirements of office equipment data lean towards the set use of the equipment. If, for instance, the organisation is thinking of outsourcing their printing needs, they may keep logs of the use of the printers, as well as the costs involved in printing consumables. This will give them an idea of what the costs were to print their normal required documents, against the cost which the external printers will charge them.