



Australian Government

BSB Business Services Training Package

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BSB Business Services Training Package

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Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB10120 Certificate I in Workplace Skills

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who have not yet entered the workforce, and are developing the necessary skills in preparation for work. They may undertake a variety of simple tasks under close supervision.

This qualification provides a range of introductory skills and knowledge to provide individuals with an understanding of the business environment.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 6

2 core units plus

4 elective units, of which:

- 2 elective units must be selected from the elective units listed below
- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selected from a Certificate I or Certificate II from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBOPS101 Use business resources

BSBPEF101 Plan and prepare for work readiness

Elective units

BSBCMM211 Apply communication skills

BSBCRT201 Develop and apply thinking and problem solving skills

BSBDAT201 Collect and record data

BSBOPS201 Work effectively in business environments

BSBOPS202 Engage with customers

BSBPEF201 Support personal wellbeing in the workplace

BSBPEF202 Plan and apply time management

BSBSUS211 Participate in sustainable work practices

BSBTEC101 Operate digital devices

BSBTEC203 Research using the internet

BSBTWK201 Work effectively with others

BSBWHS211 Contribute to the health and safety of self and others

FSKDIG002 Use digital technology for routine and simple workplace tasks

FSKLRG011 Use routine strategies for work-related learning

FSKOCM006 Use oral communication skills to participate in workplace teams

ICTICT221 Identify and use specific industry standard technologies

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB10115 Certificate I in Business.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB20120 Certificate II in Workplace Skills

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals in a variety of entry-level Business Services job roles.

This qualification also reflects the role of individuals who have not yet entered the workforce, and are developing the necessary skills in preparation for work.

These individuals carry out a range of basic procedural, clerical, administrative or operational tasks that require self-management and technology skills. They perform a range of mainly routine tasks using limited practical skills and fundamental operational knowledge in a defined context. Individuals in these roles generally work under direct supervision.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

5 core units plus

5 elective units, of which:

- 1 elective unit must be selected from Group A
- 1 elective unit must be selected from Group B
- for the remaining 3 elective units:
 - up to 3 units may be selected from Groups A, B and C
 - if not listed, up to 2 units may be selected from a Certificate I, Certificate II or Certificate III from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCMM211 Apply communication skills

BSBOPS201 Work effectively in business environments

BSBPEF202 Plan and apply time management

BSBSUS211 Participate in sustainable work practices

BSBWHS211 Contribute to the health and safety of self and others

Elective units**Group A – Self-Management**

BSBCRT201 Develop and apply thinking and problem solving skills

BSBPEF201 Support personal wellbeing in the workplace

BSBPEF302 Develop self-awareness

Group B - Technology

BSBDAT201 Collect and record data

BSBFIN301 Process financial transactions

BSBOPS306 Record stakeholder interactions

BSBTEC101 Operate digital devices

BSBTEC201 Use business software applications

BSBTEC202 Use digital technologies to communicate in a work environment

BSBTEC203 Research using the internet

Group C – Working with Others

BSBOPS202 Engage with customers

BSBOPS203 Deliver a service to customers

BSBPEF101 Plan and prepare for work readiness

BSBTWK201 Work effectively with others

SIRXCEG002 Assist with customer difficulties

SIRXPDK001 Advise on products and services

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to:

- BSB20115 Certificate II in Business
- BSB20215 Certificate II in Customer Engagement.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB30120 Certificate III in Business

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals in a variety of Business Services job roles. It is likely that these individuals are establishing their own work performance.

Individuals in these roles carry out a range of routine procedural, clerical, administrative or operational tasks that require technology and business skills. They apply a broad range of competencies using some discretion, judgment and relevant theoretical knowledge. They may provide technical advice and support to a team.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 13

6 core units plus

7 elective units, of which:

- 2 elective units must be selected from Group A
- 1 elective unit must be selected from Group B
- for the remaining 4 elective units:
 - up to 4 units may be selected from Groups A – G
 - if not listed, up to 3 units may be selected from a Certificate II, Certificate III or Certificate IV from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Specialisations

This qualification can provide for specialisations. To achieve a specialisation, the following additional packaging rules must be adhered to:

- For specialisation in **Customer Engagement**, 4 elective units must be selected from Group D
- For specialisation in **Business Administration**, 4 elective units must be selected from Group E
- For specialisation in **Medical Administration**, 4 elective units must be selected from Group F
- For specialisation in **Records and Information Management**, 4 elective units must be selected from Group G.

Where the learner has achieved a specialisation in Customer Engagement, the job roles that relate to this qualification may include Customer Service Representative.

Where the learner has achieved a specialisation in Business Administration, the job roles that relate to this qualification may include Administrative Assistant.

Where the learner has achieved a specialisation in Medical Administration, the job roles that relate to this qualification may include Medical Receptionist and Medical Secretary.

Where the learner has achieved a specialisation in Records and Information Management, the job roles that relate to this qualification may include Records Assistant.

The achievement of a specialisation will be identified on testamurs as follows:

- BSB30120 Certificate III in Business (Customer Engagement)
- BSB30120 Certificate III in Business (Administration)
- BSB30120 Certificate III in Business (Medical Administration)
- BSB30120 Certificate III in Business (Records and Information Management).

Core units

BSBCRT311 Apply critical thinking skills in a team environment

BSBPEF201 Support personal wellbeing in the workplace

BSBSUS211 Participate in sustainable work practices

BSBTWK301 Use inclusive work practices

BSBWHS311 Assist with maintaining workplace safety

BSBXCM301 Engage in workplace communication

Elective units

Group A – Technology

BSBDAT201 Collect and record data

BSBOPS306 Record stakeholder interactions

BSBTEC201 Use business software applications

BSBTEC202 Use digital technologies to communicate in a work environment

BSBTEC301 Design and produce business documents

BSBTEC302 Design and produce spreadsheets

BSBTEC303 Create electronic presentations

BSBTEC404 Use digital technologies to collaborate in a work environment

BSBWRT311 Write simple documents

BSBXCS301 Protect own personal online profile from cyber security threats

BSBXCS302 Identify and report online security threats

BSBXCS303 Securely manage personally identifiable information and workplace information

Group B – Business Competence

BSBESB302 Develop and present business proposals

BSBESB401 Research and develop business plans

BSBOPS302 Identify business risk

BSBPEF301 Organise personal work priorities

BSBPMG430 Undertake project work

BSBSTR301 Contribute to continuous improvement

BSBWHS332X Apply infection prevention and control procedures to own work activities

Group C – Teamwork and Relationships

BSBCRT412 Articulate, present and debate ideas

BSBLDR301 Support effective workplace relationships

BSBPEF302 Develop self-awareness

BSBXTW301 Work in a team

Group D – Customer and Client Engagement

BSBOPS304 Deliver and monitor a service to customers

BSBOPS305 Process customer complaints

BSBXDB301 Respond to the service needs of customers and clients with disability

ICTSAS305 Provide ICT advice to clients

SIRXCEG002 Assist with customer difficulties

SIRXCEG005 Maintain business to business relationships

SIRXMKT001 Support marketing and promotional activities

SIRXOSM003 Use social media and online tools

SIRXPDK001 Advise on products and services

Group E – Business Administration

BSBFIN301 Process financial transactions

BSBFIN302 Maintain financial records

BSBHRM416 Process payroll

BSBINS202 Handle receipt and dispatch of information

BSBOPS301 Maintain business resources

BSBOPS303 Organise schedules

BSBPUR301 Purchase goods and services

Group F – Medical Administration

BSBMED301 Interpret and apply medical terminology appropriately

BSBMED302 Prepare and process medical accounts

BSBMED303 Maintain patient records

BSBMED304 Assist in controlling stocks and supplies

BSBMED305 Apply the principles of confidentiality, privacy and security within the medical environment

BSBMED401 Manage patient record keeping system

Group G – Records and Information Management

BSBINS302 Organise workplace information

BSBINS303 Use knowledge management systems

BSBINS307 Retrieve information from records

BSBINS308 Control records

BSBINS309 Maintain business records

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to:

- BSB30115 Certificate III in Business
- BSB30215 Certificate III in Customer Engagement
- BSB30415 Certificate III in Business Administration
- BSB30815 Certificate III in Recordkeeping
- BSB30915 Certificate III in Business Administration (Education)
- BSB31115 Certificate III in Business Administration (Medical).

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB30220 Certificate III in Entrepreneurship and New Business

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals establishing or carrying on business as a sole trader or contractor, as well as those supporting the establishment of a new venture as part of a larger organisation.

These individuals apply a broad range of competencies in varied contexts, using some discretion and judgement and relevant theoretical knowledge. They may provide technical advice and support to a small team.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

4 core units plus

6 elective units, of which:

- 4 elective units must be selected from the elective units listed below
- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selected from a Certificate II, Certificate III or Certificate IV from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBESB301 Investigate business opportunities
BSBESB302 Develop and present business proposals
BSBESB303 Organise finances for new business ventures
BSBESB305 Address compliance requirements for new business ventures

Elective units

BSBCRT411 Apply critical thinking to work practices
BSBESB304 Determine resource requirements for new business ventures
BSBFIN302 Maintain financial records
BSBHRM415 Coordinate recruitment and onboarding
BSBINS309 Maintain business records
BSBLEG421 Apply understanding of the Australian legal system
BSBOPS302 Identify business risk
BSBOPS304 Deliver and monitor a service to customers
BSBOPS305 Process customer complaints
BSBOPS306 Record stakeholder interactions
BSBPEF301 Organise personal work priorities
BSBPEF302 Develop self-awareness
BSBPUR301 Purchase goods and services
BSBSTR301 Contribute to continuous improvement
BSBSTR401 Promote innovation in team environments
BSBSUS412 Develop and implement workplace sustainability plans
BSBTEC405 Review and maintain organisation's digital presence
BSBTWK401 Build and maintain business relationships
BSBWHS311 Assist with maintaining workplace safety
BSBXCM301 Engage in workplace communication
BSBXCS303 Securely manage personally identifiable information and workplace information
BSBXDB301 Respond to the service needs of customers and clients with disability
FNSFLT201 Develop and use a personal budget
SIRXCEG005 Maintain business to business relationships
SIRXOSM003 Use social media and online tools

Qualification Mapping Information

Supersedes and is equivalent to BSB30315 Certificate III in Micro Business Operations.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB30320 Certificate III in Legal Services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who use a broad range of administrative competencies in a legal environment. These individuals use some discretion and judgement and may provide technical advice and support to a team. The job roles that relate to this qualification may include Legal Administrative Assistant and Legal Receptionist.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

4 core units plus

6 elective units, of which:

- 2 elective units must be selected from Group A
- 2 elective units must be selected from Group B
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate III or Certificate IV from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBLEG311 Work in a legal services environment

BSBLEG314 Protect information in a legal services environment

BSBTEC201 Use business software applications

BSBXCM301 Engage in workplace communication

Elective units

Group A – Legal Services

BSBLEG312 Carry out search of the public record

BSBLEG313 Lodge documents in a legal services environment

BSBLEG315 Assist in planning activities in a legal services environment

BSBLEG421 Apply understanding of the Australian legal system

BSBLEG423 Conduct simple legal research

BSBOPS303 Organise schedules

Group B – Transferable Skills

BSBCRT311 Apply critical thinking skills in a team environment

BSBDAT201 Collect and record data

BSBFIN302 Maintain financial records

BSBOPS304 Deliver and monitor a service to customers

BSBOPS305 Process customer complaints

BSBOPS306 Record stakeholder interactions

BSBPEF301 Organise personal work priorities

BSBWHS211 Contribute to the health and safety of self and others

BSBWRT311 Write simple documents

BSBXTW301 Work in a team

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB31015 Certificate III in Business Administration (Legal).

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB30420 Certificate III in Library and Information Services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who use a broad range of skills and knowledge in a wide variety of environments. The job roles that relate to this qualification may include Library Assistant.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

6 core units plus

6 elective units, of which:

- 3 elective units must be selected from Group A
- 1 elective unit must be selected from Group B
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate II, Certificate III or Certificate IV from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBINS301 Develop and use information literacy skills

BSBOPS304 Deliver and monitor a service to customers

BSBTEC201 Use business software applications

BSBWHS311 Assist with maintaining workplace safety

BSBXTW301 Work in a team

CUAIND202 Develop and apply knowledge of information and cultural services organisations

Elective units

Group A – Information Services

BSBINS201 Process and maintain workplace information

BSBINS203 Assist with circulation services

BSBINS304 Process and maintain information resources

BSBINS305 Participate in cataloguing activities

BSBINS306 Provide multimedia support

BSBINS307 Retrieve information from records

BSBINS308 Control records

BSBINS309 Maintain business records

BSBINS404 Search library and information databases

Group B – Transferable Skills

BSBCRT311 Apply critical thinking skills in a team environment

BSBINS202 Handle receipt and dispatch of information

BSBINS302 Organise workplace information

BSBINS303 Use knowledge management systems

BSBOPS305 Process customer complaints

BSBOPS306 Record stakeholder interactions

BSBPEF301 Organise personal work priorities

BSBTWK301 Use inclusive work practices

BSBXCM301 Engage in workplace communication

BSBXCS303 Securely manage personally identifiable information and workplace information

BSBXDB301 Respond to the service needs of customers and clients with disability

CUAEVP211 Assist with the staging of public activities or events

ICPPRP3220 Digitise images for reproduction

ICTWEB306 Develop web presence using social media

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB31215 Certificate III in Library and Information Services.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB30719 Certificate III in Work Health and Safety

Modification History

| Release | Comments |
|-----------|---|
| Release 3 | This version released with BSB Business Services Training Package Version 7.0. Updated superseded elective units. |
| Release 2 | This version released with BSB Business Services Training Package Version 6.1. Unit added to the elective bank. |
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Qualification Description

This qualification reflects the role of individuals performing work health and safety (WHS) duties in addition to their main duties. They may provide technical advice and support to a team and apply a range of competencies in varied work contexts. It provides the skills and knowledge required to contribute to a variety of WHS tasks.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 11

6 core units plus

5 elective units, of which:

- 3 units must be from the elective units listed below
- for the remaining 2 units:
 - up to 2 units may be selected from any currently endorsed Training Package qualification or accredited course at the same Australian Qualifications Framework (AQF) level

- if not listed, 1 unit may be selected from a Certificate II or Certificate IV, from any currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBWHS307 Apply knowledge of WHS laws in the workplace

BSBWHS308 Participate in WHS hazard identification, risk assessment and risk control processes

BSBWHS309 Contribute effectively to WHS communication and consultation processes

BSBWHS310 Contribute to WHS issue-resolution processes

BSBWHS331 Participate in identifying and controlling hazardous chemicals

PUAFER001 Identify, prevent and report potential facility emergency situations

Elective units

BSBCMM211 Apply communication skills

BSBINS302 Organise workplace information

BSBLDR301 Support effective workplace relationships

BSBLDR413 Lead effective workplace relationships

BSBLDR414 Lead team effectiveness

BSBSTR301 Contribute to continuous improvement

BSBSUS411 Implement and monitor environmentally sustainable work practices

BSBTWK301 Use inclusive work practices

BSBWHS332X Apply infection prevention and control procedures to own work activities

BSBWHS416 Contribute to workplace incident response

BSBWRT311 Write simple documents

CPPWMT3044A Identify wastes and hazards

HLTAID003 Provide first aid

HLTAID005 Provide first aid in remote situations

MEM13001B Perform emergency first aid

PUAFER004 Respond to facility emergencies

RIIVEH305E Operate and maintain a four wheel drive vehicle

RIIWHS202D Enter and work in confined spaces

RIIWHS204D Work safely at heights

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB30715 Certificate III in Work Health and Safety.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40120 Certificate IV in Business

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals in a variety of Business Services job roles. These individuals may have supervisory performance accountabilities.

Individuals in these roles carry out a mix of specialist and moderately complex administrative or operational tasks that require self-development skills. They use well-developed skills and a broad knowledge base to apply solutions to a defined range of unpredictable problems and analyse information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

6 core units plus

6 elective units, of which:

- 2 elective units must be selected from Group A
- for the remaining 4 elective units:
 - up to 4 units may be selected from Groups A – J
 - if not listed, up to 2 units may be selected from a Certificate III, Certificate IV or Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Specialisations

This qualification can provide for specialisations. To achieve a specialisation, the following additional packaging rules must be adhered to:

- For specialisation in **Leadership**, 4 elective units must be selected from Group B
- For specialisation in **Business Administration**, 4 elective units must be selected from Group C
- For specialisation in **Business Operations**, 4 elective units must be selected from Group D
- For specialisation in **Sustainability**, 4 elective units must be selected from Group E
- For specialisation in **Big Data**, 4 elective units must be selected from Group F
- For specialisation in **Cyber Security**, 4 elective units must be selected from Group G
- For specialisation in **Financial Administration**, 4 elective units must be selected from Group H
- For specialisation in **Records and Information Management**, 4 elective units must be selected from Group I
- For specialisation in **Procurement**, 4 elective units must be selected from Group J.

The achievement of a specialisation will be identified on a testamur as follows:

- BSB40120 Certificate IV in Business (Leadership)
- BSB40120 Certificate IV in Business (Administration)
- BSB40120 Certificate IV in Business (Operations)
- BSB40120 Certificate IV in Business (Sustainability)
- BSB40120 Certificate IV in Business (Big Data)
- BSB40120 Certificate IV in Business (Cyber Security)
- BSB40120 Certificate IV in Business (Finance)
- BSB40120 Certificate IV in Business (Records and Information Management)
- BSB40120 Certificate IV in Business (Procurement).

Core units

BSBCRT411 Apply critical thinking to work practices

BSBTEC404 Use digital technologies to collaborate in a work environment

BSBTWK401 Build and maintain business relationships

BSBWHS411 Implement and monitor WHS policies, procedures and programs

BSBWRT411 Write complex documents

BSBXCM401 Apply communication strategies in the workplace

Elective units

Group A – Self-development

BSBPEF401 Manage personal health and wellbeing

BSBPEF402 Develop personal work priorities

BSBPEF403 Lead personal development

BSBPEF502 Develop and use emotional intelligence

Group B – Leadership

BSBATSIM421 Support a positive and culturally appropriate workforce culture

BSBCMM411 Make presentations

BSBCMM412 Lead difficult conversations

BSBCRT412 Articulate, present and debate ideas

BSBCRT413 Collaborate in creative processes

BSBHRM413 Support the learning and development of teams and individuals

BSBLDR411 Demonstrate leadership in the workplace

BSBPEF501 Manage personal and professional development

BSBSTR401 Promote innovation in team environments

BSBXDB501 Support staff members with disability in the workplace

BSBXTW401 Lead and facilitate a team

Group C – Business Administration

BSBAUD412 Work within compliance frameworks

BSBHRM417 Support human resources functions and processes

BSBINS402 Coordinate workplace information systems

BSBOPS306 Record stakeholder interactions

BSBOPS401 Coordinate business resources

BSBOPS405 Organise business meetings

BSBPMG430 Undertake project work

BSBTEC401 Design and produce complex text documents

BSBTEC402 Design and produce complex spreadsheets

BSBTEC403 Apply digital solutions to work processes

Group D – Business Operations

BSBESB401 Research and develop business plans

BSBHRM415 Coordinate recruitment and onboarding

BSBINS401 Analyse and present research information

BSBMKG431 Assess marketing opportunities

BSBMKG433 Undertake marketing activities

BSBMKG434 Promote products and services
BSBOPS402 Coordinate business operational plans
BSBOPS403 Apply business risk management processes
BSBOPS404 Implement customer service strategies
BSBOPS406 Participate in organisational governance
BSBPRC402 Negotiate contracts
BSBSTR402 Implement continuous improvement
BSBSTR503 Develop organisational policy
BSBTEC405 Review and maintain organisation's digital presence
SIRXMKT002 Use social media to engage customers
SIRXOSM005 Develop a basic website for customer engagement
SIRXSLS003 Achieve sales results

Group E – Sustainability

BSBSUS411 Implement and monitor environmentally sustainable work practices
BSBSUS412 Develop and implement workplace sustainability plans
BSBSUS413 Evaluate and report on workplace sustainability
BSBSUS511 Develop workplace policies and procedures for sustainability
CPPCMN4009 Develop team understanding of and commitment to sustainability
MSS015025 Develop a business case for sustainability improvements

Group F – Big Data

BSBXBD401 Capture and store big data
BSBXBD402 Test big data samples
BSBXBD403 Analyse big data
BSBXBD404 Use big data for operational decision making
BSBXBD405 Develop procedures for managing big data
BSBXBD406 Present big data insights
BSBXBD407 Protect big data integrity
BSBXBD408 Implement and review procedures for managing big data

Group G – Cyber Security

BSBXCS401 Maintain security of digital devices
BSBXCS402 Promote workplace cyber security awareness and best practices
BSBXCS403 Contribute to cyber security threat assessments
BSBXCS404 Contribute to cyber security risk management
BSBXCS405 Contribute to cyber security incident responses

Group H – Financial Administration

BSBFIN301 Process financial transactions
BSBFIN302 Maintain financial records
BSBFIN401 Report on financial activity
BSBHRM416 Process payroll
BSBPRC406 Conduct e-procurement
FNSACC312 Administer subsidiary accounts and ledgers
FNSACC411 Process business tax requirements
FNSACC412 Prepare operational budgets
FNSTPB402 Establish and maintain payroll systems

Group I – Records and Information Management

BSBINS402 Coordinate workplace information systems
BSBINS408 Provide information from and about records
BSBINS409 Maintain and monitor digital information and records
BSBINS410 Implement records systems for small business
BSBINS502 Coordinate data management
BSBINS504 Maintain digital repositories

Group J – Procurement

BSBPMG427 Apply project procurement procedures
BSBPRC401 Plan procurement
BSBPRC402 Negotiate contracts
BSBPRC403 Conduct international procurement
BSBPRC406 Conduct e-procurement
PSPPCM006 Select providers and develop contracts
PSPPCM007 Manage contracts
PSPPCM011 Plan to manage a contract
PSPPCM018 Conduct demand and procurement spend analysis

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to:

- BSB40215 Certificate IV in Business
- BSB40315 Certificate IV in Customer Engagement
- BSB40515 Certificate IV in Business Administration
- BSB40615 Certificate IV in Business Sales

- BSB41115 Certificate IV in International Trade
- BSB41618 Certificate IV in Business (Procurement)
- BSB41715 Certificate IV in Recordkeeping
- BSB42315 Certificate IV in Environmental Management and Sustainability.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals working as board members, contact officers and senior staff within Aboriginal and Torres Strait Islander organisations. It also applies to public servants working with Aboriginal and Torres Strait Islander boards of governance.

In these roles, individuals bring a wide range of knowledge, skills and experience to the workplace with an acute awareness that they operate in two worlds. They have cultural obligations to their community as well as legal and financial obligations to the wider community and funding bodies.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

7 core units plus

5 elective units, of which:

- 3 elective units must be selected from Group A
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate III, Certificate IV or Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBATSIC412 Maintain and protect cultural values in the organisation

BSBATSIL411 Undertake the roles and responsibilities of a board member

BSBATSIL413 Review and apply the constitution

BSBATSIM416 Oversee organisational planning

BSBATSIM417 Implement organisational plans

BSBATSIM418 Oversee financial management

BSBATSIM419 Contribute to the development and implementation of organisational policies

Elective units**Group A – Aboriginal and Torres Strait Islander Governance**

BSBATSIC411 Communicate with the community

BSBATSIL408 Manage a board meeting

BSBATSIL412 Participate effectively as a board member

BSBATSIM412 Implement a businesslike approach

BSBATSIM414 Oversee the organisation's annual budget

BSBATSIM420 Oversee asset management

BSBATSIM421 Support a positive and culturally appropriate workplace culture

BSBATSIW416 Obtain and manage consultancy services

BSBATSIW417 Select and use technology

Group B – Transferable Skills

BSBCMM412 Lead difficult conversations

BSBCRT412 Articulate, present and debate ideas

BSBESB401 Research and develop business plans

BSBESB402 Establish legal and risk management requirements of new business ventures

BSBESB406 Establish operational strategies and procedures for new business ventures

BSBINS401 Analyse and present research information

BSBLDR411 Demonstrate leadership in the workplace

BSBOPS403 Apply business risk management processes

BSBPEF401 Manage personal health and wellbeing

BSBPMG430 Undertake project work

BSBSUS412 Develop and implement workplace sustainability plans

BSBTEC403 Apply digital solutions to work processes

BSBTWK401 Build and maintain business relationships

BSBWHS411 Implement and monitor WHS policies, procedures and programs

BSBXCM401 Apply communication strategies in the workplace

BSBXCS402 Promote workplace cyber security awareness and best practices

BSBXTW401 Lead and facilitate a team

Qualification Mapping Information

Supersedes and is equivalent to BSB41915 Certificate IV in Business (Governance).

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40320 Certificate IV in Entrepreneurship and New Business

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals establishing or operating a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

These individuals use well developed skills and a broad knowledge base to solve a range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others and have responsibility for the output of others.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

4 core units plus

6 elective units, of which:

- 2 elective units must be selected from Group A
- for the remaining 4 elective units:
 - up to 3 units may be selected from Group A
 - up to 4 units may be selected from Group B
 - if not listed, up to 2 units may be selected from a Certificate III, Certificate IV or Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBESB401 Research and develop business plans

BSBESB402 Establish legal and risk management requirements of new business ventures

BSBESB403 Plan finances for new business ventures

BSBESB404 Market new business ventures

Elective units**Group A – Entrepreneurship and New Business**

BSBESB301 Investigate business opportunities

BSBESB302 Develop and present business proposals

BSBESB405 Manage compliance for small businesses

BSBESB406 Establish operational strategies and procedures for new business ventures

BSBESB407 Manage finances for new business ventures

Group B – Transferable Skills

BSBCRT411 Apply critical thinking to work practices

BSBCRT413 Collaborate in creative processes

BSBCRT512 Originate and develop concepts

BSBFIN401 Report on financial activity

BSBHRM415 Coordinate recruitment and onboarding

BSBHRM523 Coordinate the learning and development of teams and individuals

BSBINS401 Analyse and present research information

BSBINS410 Implement records systems for small business

BSBLDR412 Communicate effectively as a workplace leader

BSBLDR413 Lead effective workplace relationships

BSBLDR521 Lead the development of diverse workforces

BSBLEG421 Apply understanding of the Australian legal system

BSBMKG431 Assess marketing opportunities

BSBMKG434 Promote products and services

BSBOPS401 Coordinate business resources

BSBOPS404 Implement customer service strategies

BSBPEF401 Manage personal health and wellbeing

BSBPEF403 Lead personal development

BSBPMG430 Undertake project work

BSBPRC402 Negotiate contracts

BSBSTR401 Promote innovation in team environments

BSBSTR501 Establish innovative work environments

BSBSUS411 Implement and monitor environmentally sustainable work practices

BSBTEC403 Apply digital solutions to work processes

BSBTEC404 Use digital technologies to collaborate in a work environment

BSBTEC405 Review and maintain organisation's digital presence

BSBTWK401 Build and maintain business relationships

BSBWHS411 Implement and monitor WHS policies, procedures and programs

BSBXBD403 Analyse big data

BSBXCM401 Apply communication strategies in the workplace

BSBXCS402 Promote workplace cyber security awareness and best practices

BSBXTW401 Lead and facilitate a team

FNSACC416 Set up and operate a computerised accounting system

PSPGEN028 Provide a quotation

SIRXECM003 Design an ecommerce site

SIRXMKT006 Develop a social media strategy

SIRXOSM005 Develop a basic website for customer engagement

Qualification Mapping Information

Supersedes and is equivalent to BSB42618 Certificate IV in New Small Business.

Supersedes but is not equivalent to BSB42518 Certificate IV in Small Business Management.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40420 Certificate IV in Human Resource Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who work in a range of human resources roles. The job roles that relate to this qualification may include Human Resources Officer, Human Resources Coordinator and Payroll Officer.

Responsibilities are likely to be determined at a workplace level. Some smaller organisations may require employees to work across all aspects of human resources. In larger organisations, individuals may support a single human resources function.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

6 core units plus

6 elective units, of which:

- 2 elective units must be selected from Group A
- 2 elective units must be selected from Group B
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate III, Certificate IV or Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBHRM411 Administer performance development processes

BSBHRM412 Support employee and industrial relations

BSBHRM413 Support the learning and development of teams and individuals

BSBHRM415 Coordinate recruitment and onboarding

BSBHRM417 Support human resource functions and processes

BSBWHS411 Implement and monitor WHS policies, procedures and programs

Elective units**Group A – Human Resources**

BSBCMM412 Lead difficult conversations

BSBHRM414 Use human resources information systems

BSBHRM416 Process payroll

BSBHRM528 Coordinate remuneration and employee benefits

BSBHRM529 Coordinate separation and termination processes

BSBHRM530 Coordinate rehabilitation or return to work programs

BSBHRM531 Coordinate health and wellness programs

Group B – Transferable Skills

BSBCMM411 Make presentations

BSBCRT412 Articulate, present and debate ideas

BSBOPS403 Apply business risk management processes

BSBOPS405 Organise business meetings

BSBPEF403 Lead personal development

BSBPMG430 Undertake project work

BSBTEC404 Use digital technologies to collaborate in a work environment

BSBTWK401 Build and maintain business relationships

BSBWRT411 Write complex documents

BSBXBD403 Analyse big data

BSBXCM401 Apply communication strategies in the workplace

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB41015 Certificate IV in Human Resources.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40520 Certificate IV in Leadership and Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals working as developing and emerging leaders and managers in a range of enterprise and industry contexts.

As well as assuming responsibility for their own performance, individuals at this level are likely to provide leadership, guidance and support to others. They may also have some responsibility for organising and monitoring the output of teams.

They apply solutions to a defined range of predictable and unpredictable problems, and analyse and evaluate information from a variety of sources.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

5 core units plus

7 elective units, of which:

- 4 elective units must be selected from Group A
- for the remaining 3 elective units:
 - up to 3 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate IV or above, from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBLDR411 Demonstrate leadership in the workplace
BSBLDR413 Lead effective workplace relationships
BSBOPS402 Coordinate business operational plans
BSBXCM401 Apply communication strategies in the workplace
BSBXTW401 Lead and facilitate a team

Elective units**Group A**

BSBCMM412 Lead difficult conversations
BSBCRT411 Apply critical thinking to work practices
BSBCRT413 Collaborate in creative processes
BSBFIN401 Report on financial activity
BSBLDR412 Communicate effectively as a workplace leader
BSBLDR414 Lead team effectiveness
BSBLDR521 Lead the development of diverse workforces
BSBOPS403 Apply business risk management processes
BSBPEF402 Develop personal work priorities
BSBSTR401 Promote innovation in team environments
BSBSTR502 Facilitate continuous improvement
BSBTWK401 Build and maintain business relationships
BSBWHS411 Implement and monitor WHS policies, procedures and programs
BSBXBD403 Analyse big data
BSBXBD404 Use big data for operational decision making

Group B

BSBCRT412 Articulate, present and debate ideas
BSBOPS401 Coordinate business resources
BSBOPS404 Implement customer service strategies
BSBOPS405 Organise business meetings
BSBPEF401 Manage personal health and wellbeing
BSBPEF403 Lead personal development
BSBPEF502 Develop and use emotional intelligence
BSBPMG430 Undertake project work
BSBSUS411 Implement and monitor environmentally sustainable work practices
BSBSUS412 Develop and implement workplace sustainability plans

BSBWRT411 Write complex documents

SIRXCEG004 Create a customer-centric culture

Qualification Mapping Information

Supersedes and is equivalent to BSB42015 Certificate IV in Leadership and Management.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40620 Certificate IV in Legal Services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who use well-developed skills and a broad knowledge base to provide support in a range of legal services environments. These individuals apply solutions to a range of unpredictable problems and analyse and evaluate information from a variety of sources. The job roles that relate to this qualification may include Legal Secretary.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

5 core units plus

5 elective units, of which:

- 2 elective units must be selected from Group A
- 1 elective unit must be selected from Group B
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate III, Certificate IV or Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBLEG314 Protect information in a legal services environment
BSBLEG421 Apply understanding of the Australian legal system
BSBLEG423 Conduct simple legal research
BSBLEG424 Support the drafting of complex legal documents
BSBXCM401 Apply communication strategies in the workplace

Elective units**Group A – Legal Services**

BSBLEG422 Maintain a file in a legal services environment
BSBLEG425 Apply the principles of legal project management
BSBLEG522 Apply legal principles in contract law matters
BSBLEG523 Apply legal principles in tort law matters
BSBLEG524 Apply principles of evidence law in matters under litigation

Group B – Transferable Skills

BSBCRT412 Articulate, present and debate ideas
BSBINS401 Analyse and present research information
BSBOPS306 Record stakeholder interactions
BSBOPS403 Apply business risk management processes
BSBPEF401 Manage personal health and wellbeing
BSBPEF402 Develop personal work priorities
BSBTEC404 Use digital technologies to collaborate in a work environment
BSBTWK401 Build and maintain business relationships
BSBWRT411 Write complex documents
BSBXSC401 Maintain security of digital devices

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB42215 Certificate IV in Legal Services.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40720 Certificate IV in Library and Information Services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who use well developed skills and a broad knowledge base in a wide variety of environments. These individuals apply solutions to a defined range of unpredictable problems and analyse and evaluate information from a variety of sources. The job roles that relate to this qualification may include Library Assistant.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 14

5 core units plus

9 elective units, of which:

- 4 elective units must be selected from Group A
- 2 elective units must be selected from Group B
- for the remaining 3 elective units:
 - up to 3 units may be selected from Groups A and B
 - if not listed, up to 3 units may be selected from a Certificate III, Certificate IV or Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBINS404 Search library and information databases

BSBINS406 Assist customers to access information

BSBINS407 Consolidate and maintain library industry knowledge

BSBOPS404 Implement customer service strategies

BSBWHS311 Assist with maintaining workplace safety

Elective units

Group A – Information Services Skills

BSBINS305 Participate in cataloguing activities

BSBINS401 Analyse and present research information

BSBINS402 Coordinate workplace information systems

BSBINS403 Obtain information from external and networked sources

BSBINS405 Use integrated library management systems

BSBINS408 Provide information from and about records

BSBINS409 Maintain and monitor digital information and records

CUAEVP411 Present information on activities, events or public programs

Group B – Transferable Skills

BSBCRT411 Apply critical thinking to work practices

BSBLDR411 Demonstrate leadership in the workplace

BSBPEF402 Develop personal work priorities

BSBPMG430 Undertake project work

BSBWRT311 Write simple documents

BSBXCM401 Apply communication strategies in the workplace

BSBXCS401 Maintain security of digital devices

ICPPRP422 Digitise complex images for reproduction

ICTWEB306 Develop web presence using social media

SIRXCEG004 Create a customer-centric culture

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB42115 Certificate IV in Library and Information Services.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40820 Certificate IV in Marketing and Communication

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who use well developed marketing and communication skills and a broad knowledge base in a wide variety of contexts. This qualification applies to individuals in full-time marketing roles, as well as those who are responsible for an organisation's marketing in addition to other duties.

Individuals in these roles apply solutions to a defined range of unpredictable problems and analyse and evaluate information from a variety of sources.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

6 core units plus

6 elective units, of which:

- 2 elective units must be selected from Group A
- 2 elective units must be selected from Group B
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate III, Certificate IV or Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCMM411 Make presentations

BSBCRT412 Articulate, present and debate ideas

BSBMKG433 Undertake marketing activities

BSBMKG435 Analyse consumer behaviour

BSBMKG439 Develop and apply knowledge of communications industry

BSBWRT411 Write complex documents

Elective units**Group A – Marketing**

BSBMKG431 Assess marketing opportunities

BSBMKG432 Research international markets

BSBMKG434 Promote products and services

BSBMKG436 Design and test direct marketing activities

BSBMKG437 Create and optimise digital media

BSBMKG438 Implement and monitor advertising production

BSBMKG440 Apply marketing communication across a convergent industry

BSBMKG441 Develop public relations documents

BSBMKG442 Conduct e-marketing communications

SIRXECM002 Prepare digital content

SIRXMKT006 Develop a social media strategy

Group B – Transferable Skills

BSBCRT411 Apply critical thinking to work practices

BSBCRT413 Collaborate in creative processes

BSBESB404 Market new business ventures

BSBFIN401 Report on financial activity

BSBOPS306 Record stakeholder interactions

BSBOPS403 Apply business risk management processes

BSBOPS404 Implement customer service strategies

BSBPEF402 Develop personal work priorities

BSBTEC303 Create electronic presentations

BSBTWK401 Build and maintain business relationships

BSBTWK503 Manage meetings

BSBXBD403 Analyse big data

BSBXCM401 Apply communication strategies in the workplace

SIRXOSM005 Develop a basic website for customer engagement

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB42415 Certificate IV in Marketing and Communication.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB40920 Certificate IV in Project Management Practice

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who apply project management skills and knowledge in a wide variety of contexts. The job roles that relate to this qualification may include Contracts Officer, Project Administrator and Quality Officer.

Individuals in these roles work autonomously, and might be members of a project team, with no direct responsibility for overall project outcomes. Primarily, these roles would support wider project operations. They may use project tools and methodologies selectively to support organisational or business activities.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 9

3 core units plus

6 elective units, of which:

- 3 elective units must be selected from Group A
- for the remaining 3 elective units:
 - up to 3 units may be selected from Groups A and B
 - if not listed, up to 3 units may be selected from a Certificate IV or higher from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Chosen elective units must not include BSBPMG430 Undertake project work.

Core units

BSBPMG420 Apply project scope management techniques

BSBPMG421 Apply project time management techniques

BSBPMG422 Apply project quality management techniques

Elective units**Group A – Project Management**

BSBPMG423 Apply project cost management techniques

BSBPMG424 Apply project human resources management approaches

BSBPMG425 Apply project information management and communications techniques

BSBPMG426 Apply project risk management techniques

BSBPMG427 Apply project procurement procedures

BSBPMG428 Apply project life cycle management processes

BSBPMG429 Apply project stakeholder engagement techniques

Group B – Transferable Skills

BSBCRT411 Apply critical thinking to work practices

BSBLDR413 Lead effective workplace relationships

BSBLEG522 Apply legal principles in contract law matters

BSBOPS401 Coordinate business resources

BSBPEF401 Manage personal health and wellbeing

BSBPEF402 Develop personal work priorities

BSBSUS411 Implement and monitor environmentally sustainable work practices

BSBTEC403 Apply digital solutions to work processes

BSBTEC404 Use digital technologies to collaborate in a work environment

BSBWHS411 Implement and monitor WHS policies, procedures and programs

BSBXCS401 Maintain security of digital devices

CPPDSM4047 Implement and monitor procurement process

MSMENV472 Implement and monitor environmentally sustainable work practices

PSPETH002 Uphold and support the values and principles of public service

PSPGEN043 Apply government processes

PSPPCY004 Support policy implementation

TLIE4006 Collect, analyse and present workplace data and information

Qualification Mapping Information

Supersedes and is equivalent to BSB41515 Certificate IV in Project Management Practice.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB41419 Certificate IV in Work Health and Safety

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Updated superseded elective units. |
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Qualification Description

This qualification applies to individuals working in a work health and safety (WHS) role who provide a broad range of technical knowledge and skills, and have some limited responsibility for the output of others.

The qualification applies to those working as supervisors, WHS personnel, and workers in other WHS-related roles who manage risks effectively, apply relevant WHS laws, and contribute to WHS within the workplace in known or changing contexts with established parameters.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 10

5 core units plus

5 elective units, of which:

- 3 units must be from Group A below
- the remaining 2 units may be selected as follows:
 - both may be selected from Group A, Group B or any currently endorsed Training Package qualification or accredited course at the same Australian Qualifications Framework (AQF) level

- 1 may be selected from a Certificate III or Diploma, from any currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBWHS412 Assist with workplace compliance with WHS laws

BSBWHS413 Contribute to implementation and maintenance of WHS consultation and participation processes

BSBWHS414 Contribute to WHS risk management

BSBWHS415 Contribute to implementing WHS management systems

BSBWHS416 Contribute to workplace incident response

Elective units

Group A

BSBINS401 Analyse and present research information

BSBWHS417 Assist with managing WHS implications of return to work

BSBWHS418 Assist with managing WHS compliance of contractors

BSBWHS419 Contribute to implementing WHS monitoring processes

BSBWHS431 Develop processes and procedures for controlling hazardous chemicals in the workplace

BSBWRT411 Write complex documents

Group B

BSBCMM411 Make presentations

BSBLDR411 Demonstrate leadership in the workplace

BSBPMG420 Apply project scope management techniques

BSBSTR401 Promote innovation in team environments

BSBSTR402 Implement continuous improvement

BSBSUS411 Implement and monitor environmentally sustainable work practices

PUACOM008 Develop and organise public safety awareness programs

PUAWHS003 Implement and monitor organisational work, health and safety policies, procedures and programs

RIIWHS403D Apply the mine work health and safety management plan

TAEASS301 Contribute to assessment

TAEDEL301 Provide work skill instruction

Qualification Mapping Information

Supersedes and is equivalent to BSB41415 Certificate IV in Work Health and Safety.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50120 Diploma of Business

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals in a variety of Business Services job roles. These individuals may have frontline management accountabilities.

Individuals in these roles carry out moderately complex tasks in a specialist field of expertise that requires business operations skills. They may possess substantial experience in a range of settings, but seek to further develop their skills across a wide range of business functions.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

5 core units plus

7 elective units, of which:

- 2 elective units must be selected from Group A
- for the remaining 5 elective units:
 - up to 5 units may be selected from Groups A – I
 - if not listed, up to 2 units may be selected from a Certificate IV, Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Specialisations

This qualification can provide for specialisations. To achieve a specialisation, the following additional packaging rules must be adhered to:

- For specialisation in **Business Operations**, 4 elective units must be selected from Group A
- For specialisation in **Leadership**, 4 elective units must be selected from Group B
- For specialisation in **Organisational Development**, 4 elective units must be selected from Group C
- For specialisation in **Compliance**, 4 elective units must be selected from Group D
- For specialisation in **Business Development**, 4 elective units must be selected from Group E
- For specialisation in **Digital and Data**, 4 elective units must be selected from Group F
- For specialisation in **Records and Information Management**, 4 elective units must be selected from Group G
- For specialisation in **Procurement**, 4 elective units must be selected from Group H
- For specialisation in **Evaluations**, 4 elective units must be selected from Group I.

The achievement of a specialisation will be identified on a testamur as follows:

- BSB50120 Diploma of Business (Operations)
- BSB50120 Diploma of Business (Leadership)
- BSB50120 Diploma of Business (Organisational Development)
- BSB50120 Diploma of Business (Compliance)
- BSB50120 Diploma of Business (Business Development)
- BSB50120 Diploma of Business (Digital Transformation)
- BSB50120 Diploma of Business (Records and Information Management)
- BSB50120 Diploma of Business (Procurement)
- BSB50120 Diploma of Business (Evaluations).

Core units

BSBCRT511 Develop critical thinking in others

BSBFIN501 Manage budgets and financial plans

BSBOPS501 Manage business resources

BSBSUS511 Develop workplace policies and procedures for sustainability

BSBXCM501 Lead communication in the workplace

Elective units

Group A – Business Operations

BSBFIN502 Manage financial compliance

BSBFIN601 Manage organisational finances

BSBHRM525 Manage recruitment and onboarding

BSBHRM526 Manage payroll
BSBHRM529 Coordinate separation and termination processes
BSBINS512 Monitor business records systems
BSBOPS502 Manage business operational plans
BSBOPS503 Develop administrative systems
BSBOPS504 Manage business risk
BSBOPS601 Develop and implement business plans
BSBPMG430 Undertake project work
BSBPMG530 Manage project scope
BSBPRC505 Manage ethical procurement strategy
BSBSTR503 Develop organisational policy
BSBSTR603 Develop business continuity plans
BSBSUS601 Lead corporate social responsibility
BSBTWK503 Manage meetings

Group B – Leadership

BSBHRM412 Support employee and industrial relations
BSBHRM521 Facilitate performance development processes
BSBLDR521 Lead the development of diverse workforces
BSBLDR522 Manage people performance
BSBLDR523 Lead and manage effective workplace relationships
BSBPEF501 Manage personal and professional development
BSBTWK501 Lead diversity and inclusion
BSBTWK502 Manage team effectiveness
BSBXDB501 Support staff members with disability in the workplace
BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Group C – Organisational Development

BSBCRT412 Articulate, present and debate ideas
BSBCRT512 Originate and develop concepts
BSBCRT611 Apply critical thinking for complex problem solving
BSBHRM531 Coordinate health and wellness programs
BSBLDR601 Lead and manage organisational change
BSBPEF401 Manage personal health and wellbeing
BSBPEF502 Develop and use emotional intelligence
BSBSTR501 Establish innovative work environments

BSBSTR502 Facilitate continuous improvement

BSBSTR601 Manage innovation and continuous improvement

BSBSUS412 Develop and implement workplace sustainability plans

BSBSUS413 Evaluate and report on workplace sustainability

BSBTWK601 Develop and maintain strategic business networks

Group D – Compliance

BSBAUD411 Participate in quality audits

BSBAUD513 Report on quality audits

BSBAUD514 Interpret compliance requirements

BSBAUD515 Evaluate and review compliance

BSBLEG522 Apply legal principles in contract law matters

BSBOPS602 Monitor corporate governance activities

BSBWHS521 Ensure a safe workplace for a work area

Group E – Business Development

BSBMKG541 Identify and evaluate marketing opportunities

BSBMKG546 Develop social media engagement plans

BSBMKG548 Forecast international market and business needs

BSBMKG549 Profile and analyse consumer behaviour for international markets

BSBMKG550 Promote products and services to international markets

BSBOPS404 Implement customer service strategies

BSBOPS505 Manage organisational customer service

BSBPRC502 Manage supplier relationships

BSBTWK401 Build and maintain business relationships

SIRXMGT005 Lead the development of business opportunities

SIRXMKT006 Develop a social media strategy

SIRXSLS004 Drive sales results

Group F – Digital and Data

BSBDAT501 Analyse data

BSBINS502 Coordinate data management

BSBTEC403 Apply digital solutions to work processes

BSBTEC404 Use digital technologies to collaborate in a work environment

BSBTEC501 Develop and implement an e-commerce strategy

BSBTEC601 Review organisational digital strategy

BSBXBD501 Develop big data strategy

BSBXCS402 Promote workplace cyber security awareness and best practices

SIRXECM003 Design an ecommerce site

Group G – Records and Information Management

BSBINS501 Implement information and knowledge management systems

BSBINS504 Maintain digital repositories

BSBINS512 Monitor business records systems

BSBINS513 Contribute to records management framework

BSBINS514 Contribute to records retention and disposal schedule

BSBINS515 Participate in archiving activities

BSBINS601 Manage knowledge and information

CUAPRE401 Implement preventative conservation activities

Group H – Procurement

BSBPMG537 Manage project procurement

BSBPRC501 Manage procurement strategies

BSBPRC502 Manage supplier relationships

BSBPRC503 Manage international procurement

BSBPRC504 Manage a supply chain

BSBPRC505 Manage ethical procurement strategy

PSPPCM008 Manage contract performance

PSPPCM009 Finalise contracts

PSPPCM010 Manage procurement risk

PSPPCM012 Plan for procurement outcomes

PSPPCM013 Make procurement decisions

PSPPCM015 Conduct and manage coordinated procurement

PSPPCM016 Plan and implement strategic sourcing

PSPPCM017 Plan and implement procurement category management

PSPPCM018 Conduct demand and procurement spend analysis

Group I – Evaluations

DEFEVL001 Develop an evaluation program

DEFEVL002 Evaluate and report collected information

DEFEVL003 Maintain and enhance professional practice

DEFEVL004 Evaluate a training and assessment system

DEFEVL005 Evaluate a community based program

DEFEVL006 Evaluate business performance

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to:

- BSB50215 Diploma of Business
- BSB50315 Diploma of Customer Engagement
- BSB50415 Diploma of Business Administration
- BSB50815 Diploma of International Business
- BSB51518 Diploma of Business (Procurement)
- BSB51715 Diploma of Recordkeeping
- BSB60815 Advanced Diploma of Recordkeeping.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who contribute their skills and knowledge to leading, monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations. Individuals in these roles operate in two worlds; they have cultural obligations to their community as well as legal and financial obligations to the wider community and funding bodies.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

7 core units plus

5 elective units, of which:

- 3 elective units must be selected from Group A
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate IV, Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course
- If selecting the unit PSPGEN049 Undertake negotiations, Registered Training Organisations should contextualise it to include situations relevant to negotiations undertaken by board members of Aboriginal and Torres Strait Islander organisations.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBATSIC412 Maintain and protect cultural values in the organisation

BSBATSIL411 Undertake the roles and responsibilities of a board member

BSBATSIL503 Manage conflict

BSBATSIL510 Appoint and work with a manager

BSBATSIL511 Lead the organisation's strategic planning cycle

BSBATSIM505 Control organisational finances

BSBATSIM506 Develop employment policies

Elective units**Group A – Aboriginal and Torres Strait Islander Governance**

BSBATSIC511 Plan and conduct a community meeting

BSBATSIL512 Be a leader in the community

BSBATSIM511 Develop enterprise opportunities

BSBATSIM514 Recruit and induct staff

BSBATSIW514 Represent your organisation

BSBATSIW515 Secure funding

Group B – Transferable Skills

BSBAUD514 Interpret compliance requirements

BSBDAT501 Analyse data

BSBFIN502 Manage financial compliance

BSBHRM522 Manage employee and industrial relations

BSBHRM524 Coordinate workforce plan implementation

BSBLDR521 Lead the development of diverse workforces

BSBLEG529 Apply legal principles in corporation law matters

BSBOPS501 Manage business resources

BSBOPS504 Manage business risk

BSBPEF501 Manage personal and professional development

BSBPRC502 Manage supplier relationships

BSBSTR502 Facilitate continuous improvement

BSBSTR503 Develop organisational policy

BSBSUS511 Develop workplace policies and procedures for sustainability

BSBTWK501 Lead diversity and inclusion

BSBXCM501 Lead communication in the workplace

BSBXDB501 Support staff members with disability in the workplace

BSBXDB502 Adapt organisations to enhance accessibility for people with disability

PSPGEN049 Undertake negotiations

Qualification Mapping Information

Supersedes and is equivalent to BSB50715 Diploma of Business (Governance).

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50320 Diploma of Human Resource Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals working in a variety of roles within the human resources sector. The job roles that relate to this qualification may include Human Resources Consultant, Human Resources Advisor and Human Resources Business Partner.

Responsibilities are likely to be determined at a workplace level. Some smaller organisations may require employees to work across all aspects of human resources. In larger organisations, individuals may coordinate a single human resources function.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed the following units (or equivalent competencies): BSBHRM411 Administer performance development processes; BSBHRM412 Support employee and industrial relations; BSBHRM415 Coordinate recruitment and onboarding; and BSBHRM417 Support human resource functions and processes. Equivalent competencies are predecessors to these units, which have been mapped as equivalent.

or

Have two years equivalent full-time relevant work experience.

Packaging Rules

Total number of units = 12

7 core units plus

5 elective units, of which:

- 2 elective units must be selected from Group A
- 2 elective units must be selected from Group B

- for the remaining 1 elective unit:
 - up to 1 unit may be selected from Groups A and B
 - if not listed, 1 unit may be selected from a Certificate IV, Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBHRM521 Facilitate performance development processes

BSBHRM522 Manage employee and industrial relations

BSBHRM523 Coordinate the learning and development of teams and individuals

BSBHRM524 Coordinate workforce plan implementation

BSBHRM527 Coordinate human resource functions and processes

BSBOPS504 Manage business risk

BSBWHS411 Implement and monitor WHS policies, procedures and programs

Elective units

Group A – Human Resources

BSBHRM414 Use human resources information systems

BSBHRM525 Manage recruitment and onboarding

BSBHRM526 Manage payroll

BSBHRM528 Coordinate remuneration and employee benefits

BSBHRM529 Coordinate separation and termination processes

BSBHRM530 Coordinate rehabilitation and return to work programs

BSBHRM531 Coordinate health and wellness programs

BSBWHS521 Ensure a safe workplace for a work area

BSBXDB401 Develop and implement recruitment processes that are inclusive of people with disability

Group B – Transferable Skills

BSBCMM511 Communicate with influence

BSBCRT511 Develop critical thinking in others

BSBDAT501 Analyse data

BSBFIN501 Manage budgets and financial plans

BSBLDR523 Lead and manage effective workplace relationships

BSBPEF501 Manage personal and professional development

BSBPMG430 Undertake project work

BSBSTR503 Develop organisational policy

BSBTWK501 Lead diversity and inclusion

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB50618 Diploma of Human Resources Management.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50420 Diploma of Leadership and Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who apply knowledge, practical skills and experience in leadership and management across a range of enterprise and industry contexts.

Individuals at this level display initiative and judgement in planning, organising, implementing and monitoring their own workload and the workload of others. They use communication skills to support individuals and teams to meet organisational or enterprise requirements.

They may plan, design, apply and evaluate solutions to unpredictable problems, and identify, analyse and synthesise information from a variety of sources.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

6 core units plus

6 elective units, of which:

- 4 elective units must be selected from the elective units listed below
- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selected from a Certificate IV or above, from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCMM511 Communicate with influence

BSBCRT511 Develop critical thinking in others

BSBLDR523 Lead and manage effective workplace relationships

BSBOPS502 Manage business operational plans

BSBPEF502 Develop and use emotional intelligence

BSBTWK502 Manage team effectiveness

Elective units

BSBCMM412 Lead difficult conversations

BSBCRT512 Originate and develop concepts

BSBFIN501 Manage budgets and financial plans

BSBFIN502 Manage financial compliance

BSBHRM522 Manage employee and industrial relations

BSBHRM524 Coordinate workforce plan implementation

BSBHRM531 Coordinate health and wellness programs

BSBLDR521 Lead the development of diverse workforces

BSBLDR522 Manage people performance

BSBOPS501 Manage business resources

BSBOPS503 Develop administrative systems

BSBOPS504 Manage business risk

BSBOPS505 Manage organisational customer service

BSBPEF501 Manage personal and professional development

BSBSTR501 Establish innovative work environments

BSBSTR502 Facilitate continuous improvement

BSBSTR503 Develop organisational policy

BSBSUS511 Develop workplace policies and procedures for sustainability

BSBTWK501 Lead diversity and inclusion

BSBTWK503 Manage meetings

BSBWHS521 Ensure a safe workplace for a work area

BSBXBD501 Develop big data strategy

BSBXCM501 Lead communication in the workplace

BSBXDB501 Support staff members with disability in the workplace

BSBXDB502 Adapt organisations to enhance accessibility for people with disability

SIRXOSM007 Manage risk to organisational reputation in an online setting

Qualification Mapping Information

Supersedes and is equivalent to BSB51918 Diploma of Leadership and Management.

Links

Companion Volume Implementation Guides are available from VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50520 Diploma of Library and Information Services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals with a sound theoretical knowledge base in library and information services, who use a range of specialised technical competencies to plan, carry out and evaluate their own work or the work of a team. They may help people locate information, undertake research, as well as analyse and communicate information, ideas and concepts at a complex level. They may provide leadership and guidance to others and have some responsibility for the output of others. The job roles that relate to this qualification may include Library Technician and Research Assistant.

To meet accreditation requirements for the Australian Library and Information Association (ALIA) as a Library Technician, the candidate must have completed at least 70 hours of work placement as detailed in the Assessment Requirements of units of competency.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 16

4 core units plus

12 elective units, of which:

- 7 elective units must be selected from Group A
- 1 elective unit must be selected from Group B
- 2 elective units must be selected from Group C
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A, B and C

- if not listed, up to 2 units may be selected from a Certificate IV, Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBINS407 Consolidate and maintain library industry knowledge

BSBINS503 Monitor compliance with copyright and licence requirements

BSBINS602 Extend own information literacy skills to locate information

ICTSAS432 Identify and resolve client ICT problems

Elective units

Group A – Library Services

BSBINS403 Obtain information from external and networked sources

BSBINS404 Search library and information databases

BSBINS504 Maintain digital repositories

BSBINS506 Implement lending and borrowing processes for collections

BSBINS507 Use advanced functions of integrated library management systems

BSBINS508 Research and analyse information to meet library customer needs

BSBINS509 Promote literature and reading

BSBINS510 Develop community and stakeholder relationships in a library environment

BSBINS511 Develop and promote library activities, events and public programs

BSBINS516 Undertake cataloguing activities

BSBINS604 Contribute to collection management

Group B – Information Services Skills

BSBINS501 Implement information and knowledge management systems

BSBINS502 Coordinate data management

BSBINS505 Provide subject access and classify material

BSBINS512 Monitor business records systems

BSBINS513 Contribute to records management framework

BSBINS514 Contribute to records retention and disposal schedule

BSBINS515 Participate in archiving activities

BSBINS601 Manage knowledge and information

BSBINS603 Initiate and lead applied research

CUAPRE401 Implement preventative conservation activities

CUACNM601 Manage collection maintenance and preservation procedures

Group C – Transferable Skills

BSBCMM411 Make presentations

BSBDAT501 Analyse data

BSBLDR414 Lead team effectiveness

BSBOPS304 Deliver and monitor a service to customers

BSBOPS404 Implement customer service strategies

BSBOPS503 Develop administrative systems

BSBPEF501 Manage personal and professional development

BSBPMG430 Undertake project work

BSBTEC403 Apply digital solutions to work processes

BSBTEC405 Review and maintain organisation's digital presence

BSBWHS411 Implement and monitor WHS policies, procedures and programs

BSBWRT411 Write complex documents

BSBXCS402 Promote workplace cyber security awareness and best practices

TAEDEL301 Provide work skill instruction

TAEDEL401 Plan, organise and deliver group-based learning

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB52115 Diploma of Library and Information Services.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50620 Diploma of Marketing and Communication

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who use a sound theoretical knowledge base in marketing and communication and who demonstrate a range of skills to ensure that functions are effectively conducted in an organisation or business area. Typically, the individuals would have responsibility for the work of other staff and lead teams.

This qualification applies to individuals in full-time marketing roles, as well as those who are responsible for an organisation's marketing in addition to other duties.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed the following units (or equivalent competencies): BSBCMM411 Make presentations; BSBCRT412 Articulate, present and debate ideas; BSBMKG433 Undertake marketing activities; BSBMKG435 Analyse consumer behaviour; BSBMKG439 Develop and apply knowledge of communications industry; and BSBWRT411 Write complex documents. Equivalent competencies are predecessors to these units, which have been mapped as equivalent.

or

Have two years equivalent full-time relevant work experience.

Packaging Rules

Total number of units = 12

5 core units plus

7 elective units, of which:

- 3 elective units must be selected from Group A

- 2 elective units must be selected from Group B
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate IV, Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBMKG541 Identify and evaluate marketing opportunities

BSBMKG542 Establish and monitor the marketing mix

BSBMKG552 Design and develop marketing communication plans

BSBMKG555 Write persuasive copy

BSBPMG430 Undertake project work

Elective units

Group A – Marketing

BSBMKG543 Plan and interpret market research

BSBMKG544 Plan and monitor direct marketing activities

BSBMKG545 Conduct marketing audits

BSBMKG546 Develop social media engagement plans

BSBMKG547 Develop strategies to monetise digital engagement

BSBMKG548 Forecast international market and business needs

BSBMKG549 Profile and analyse consumer behaviour for international markets

BSBMKG550 Promote products and services to international markets

BSBMKG551 Create multiplatform advertisements for mass media

BSBMKG553 Develop public relations campaigns

BSBMKG554 Plan and develop public relations publications

SIRXMKT006 Develop a social media strategy

SIRXMKT007 Develop a digital marketing plan

SIRXOSM007 Manage risk to organisational reputation in an online setting

Group B – Transferable Skills

BSBCMM511 Communicate with influence

BSBCRT512 Originate and develop concepts

BSBDAT501 Analyse data

BSBFIN501 Manage budgets and financial plans

BSBOPS504 Manage business risk

BSBOPS505 Manage organisational customer service

BSBPEF501 Manage personal and professional development

BSBST501 Establish innovative work environments

BSBTEC404 Use digital technologies to collaborate in a work environment

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB52415 Diploma of Marketing and Communication.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50720 Diploma of Paralegal Services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies to plan and carry out work in a legal context in accordance with legislation, regulations and codes of practice relevant to the different jurisdictions. The job roles that relate to this qualification may include Paralegal.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed the following units (or equivalent competencies): BSBLEG314 Protect information in a legal services environment; BSBLEG423 Conduct simple legal research; and BSBLEG424 Support the drafting of complex legal documents. Equivalent competencies are predecessors to these units, which have been mapped as equivalent.

or

Have two years equivalent full-time relevant work experience.

Packaging Rules

Total number of units = 12

5 core units plus

7 elective units, of which:

- 3 elective units must be selected from Group A
- 2 elective units must be selected from Group B
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B

- if not listed, up to 2 units may be selected from a Certificate IV, Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBLEG421 Apply understanding of the Australian legal system

BSBLEG422 Maintain a file in a legal services environment

BSBLEG521 Conduct and apply legal research

BSBLEG534 Take instructions in a legal services environment

BSBWRT411 Write complex documents

Elective units

Group A – Legal Services

BSBLEG425 Apply principles of legal project management

BSBLEG522 Apply legal principles in contract law matters

BSBLEG523 Apply legal principles in tort law matters

BSBLEG524 Apply principles of evidence law in matters under litigation

BSBLEG525 Apply legal principles in intellectual property law matters

BSBLEG526 Apply legal principles in criminal law matters

BSBLEG527 Apply legal principles in family law matters

BSBLEG528 Apply legal principles in property law matters

BSBLEG529 Apply legal principles in corporation law matters

BSBLEG530 Apply legal principles in wills and probate matters

BSBLEG531 Apply legal principles in administrative law matters

BSBLEG532 Assist with court procedure

BSBLEG533 Support alternative dispute resolution processes

Group B – Transferable Skills

BSBCMM511 Communicate with influence

BSBCRT511 Develop critical thinking in others

BSBDAT501 Analyse data

BSBOPS403 Apply business risk management processes

BSBPEF501 Manage personal and professional development

BSBTWK401 Build and maintain business relationships

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB52215 Diploma of Legal Services.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50820 Diploma of Project Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who apply project management skills and knowledge in a variety of contexts, across a number of industry sectors. The job roles that relate to this qualification may include Project Manager and Project Team Leader.

Individuals in these roles have project leadership and management roles and are responsible for achieving project objectives. They possess a sound theoretical knowledge base and use a range of specialised, technical and managerial competencies to initiate, plan, execute and evaluate their own work and/or the work of others.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

8 core units plus

4 elective units, of which:

- 2 elective units must be selected from the elective units listed below
- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selected from a Diploma or above, from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Chosen elective units must not include BSBPMG430 Undertake project work.

Core units

BSBPMG530 Manage project scope

BSBPMG531 Manage project time

BSBPMG532 Manage project quality

BSBPMG533 Manage project cost

BSBPMG534 Manage project human resources

BSBPMG535 Manage project information and communication

BSBPMG536 Manage project risk

BSBPMG540 Manage project integration

Elective units

BSBAUD514 Interpret compliance requirements

BSBCEM511 Communicate with influence

BSBCRT511 Develop critical thinking in others

BSBDAT501 Analyse data

BSBINS501 Implement information and knowledge management systems

BSBLDR522 Manage people performance

BSBLDR601 Lead and manage organisational change

BSBOPS501 Manage business resources

BSBPEF501 Manage personal and professional development

BSBPMG537 Manage project procurement

BSBPMG538 Manage project stakeholder engagement

BSBPMG539 Manage project governance

BSBPMG541 Manage complex projects

BSBSTR501 Establish innovative work environments

BSBSTR502 Facilitate continuous improvement

BSBSUS511 Develop workplace policies and procedures for sustainability

BSBTWK502 Manage team effectiveness

BSBWHS521 Ensure a safe workplace for a work area

ICTICT517 Match ICT needs with the strategic direction of the organisation

ICTICT526 Verify client business requirements

MSS015022 Develop strategies for more sustainable use of resources

PSPETH003 Promote the values and ethos of public service

Qualification Mapping Information

Supersedes and is equivalent to BSB51415 Diploma of Project Management.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB50920 Diploma of Quality Auditing

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in quality auditing and use a range of specialised, technical or managerial competencies to plan, carry out and evaluate their own work or the work of an audit team. The job roles that relate to this qualification may include Lead Auditor and Quality Assurance Manager.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 12

4 core units plus

8 elective units, of which:

- 2 elective units must be selected from Group A
- 2 elective units must be selected from Group B
- for the remaining 4 elective units:
 - up to 4 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Certificate IV from this or any other currently endorsed Training Package qualification or accredited course
 - if not listed, up to 4 units may be selected from a Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBAUD411 Participate in quality audits

BSBAUD511 Initiate quality audits

BSBAUD512 Lead quality audits

BSBAUD513 Report on quality audits

Elective units**Group A – Audit and Compliance**

BSBAUD412 Work within compliance frameworks

BSBAUD514 Interpret compliance requirements

BSBAUD515 Evaluate and review compliance

BSBAUD516 Develop and monitor processes for the management of breaches in compliance requirements

BSBAUD601 Establish and manage compliance management systems

MSS014013 Contribute to sustainability related audits

Group B – Transferable Skills

BSBCMM511 Communicate with influence

BSBCRT511 Develop critical thinking in others

BSBDAT501 Analyse data

BSBINS501 Implement information and knowledge management systems

BSBINS502 Coordinate data management

BSBLDR522 Manage people performance

BSBOPS504 Manage business risk

BSBPEF501 Manage personal and professional development

BSBPMG532 Manage project quality

BSBSTR502 Facilitate continuous improvement

BSBSUS511 Develop workplace policies and procedures for sustainability

BSBTWK502 Manage team effectiveness

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB51615 Diploma of Quality Auditing.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB51319 Diploma of Work Health and Safety

Modification History

| Release | Comments |
|-----------|--|
| Release 3 | This version released with BSB Business Services Training Package Version 7.0. Updated superseded elective units. |
| Release 2 | This version first released with BSB Business Services Training Package Version 6.0. Version created to resolve error in unit grid. |
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Qualification Description

This qualification reflects the role of individuals coordinating and maintaining the work health and safety (WHS) program in an organisation. The qualification applies to supervisors and managers who apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

All BSB41419 Certificate IV in Work Health and Safety core units or equivalent competencies. Equivalent competencies are predecessors to the following units which have been mapped as equivalent.

- BSBWHS412 Assist with workplace compliance with WHS laws
- BSBWHS413 Contribute to implementation and maintenance of WHS consultation and participation processes
- BSBWHS414 Contribute to WHS risk management
- BSBWHS415 Contribute to implementing WHS management systems
- BSBWHS416 Contribute to workplace incident response.
-

Packaging Rules

Total number of units = 10

5 core units plus

5 elective units, of which:

- at least 3 units must be from Group A below
- the remaining 2 units may be selected from Group A and/or Group B or from a Certificate IV, Diploma or Advanced Diploma, from any currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the Australian Qualifications Framework (AQF) alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBWHS513 Lead WHS risk management

BSBWHS515 Lead initial response to and investigate WHS incidents

BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system

BSBWHS519 Lead the development and use of WHS risk management tools

BSBWHS522 Manage WHS consultation and participation processes

Elective units

Group A

BSBWHS512 Contribute to managing work-related psychological health and safety

BSBWHS514 Manage WHS compliance of contractors

BSBWHS517 Contribute to managing a WHS information system

BSBWHS518 Manage WHS hazards associated with maintenance and use of plant

BSBWHS520 Manage implementation of emergency procedures

BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals

Group B

BSBCMM511 Communicate with influence

BSBDAT501 Analyse data

BSBHRM530 Coordinate rehabilitation and return to work programs

BSBLDR522 Manage people performance

BSBLDR601 Lead and manage organisational change

BSBPEF502 Develop and use emotional intelligence

BSBSTR502 Facilitate continuous improvement

BSBSUS511 Develop workplace policies and procedures for sustainability

BSBTWK502 Manage team effectiveness

BSBWHS521 Ensure a safe workplace for a work area

TAEDEL401 Plan, organise and deliver group-based learning

Qualification Mapping Information

Supersedes and is equivalent to BSB51315 Diploma of Work Health and Safety.

Links

Companion Volume Implementation Guides are available from VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB60120 Advanced Diploma of Business

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals in a variety of Business Services job roles. These individuals may have general management accountabilities.

Individuals in these roles carry out complex tasks in a specialist field of expertise. They may undertake technical research and analysis, and will often contribute to setting the strategic direction for a work area.

The qualification is suited to individuals who are responsible for the supervision and leadership of a team or work area (including by managing staff performance and making staffing decisions).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed a Diploma or Advanced Diploma from the BSB Training Package (current or superseded equivalent versions).

or

Have two years equivalent full-time relevant workplace experience in an operational or leadership role in an enterprise.

Packaging Rules

Total number of units = 10

5 core units plus

5 elective units, of which:

- 3 elective units must be selected from elective Group A
- for the remaining 2 units:

- up to 2 elective units may be selected from elective Groups A and B
- if not listed, up to 2 elective units may be selected from a Diploma or Advanced Diploma, from any currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCRT611 Apply critical thinking for complex problem solving

BSBFIN601 Manage organisational finances

BSBOPS601 Develop and implement business plans

BSBSUS601 Lead corporate social responsibility

BSBTEC601 Review organisational digital strategy

Elective units

Group A

BSBHRM614 Contribute to strategic workforce planning

BSBINS601 Manage knowledge and information

BSBLDR601 Lead and manage organisational change

BSBST601 Manage innovation and continuous improvement

BSBST602 Develop organisational strategies

BSBST603 Develop business continuity plans

BSBTWK601 Develop and maintain strategic business networks

BSBWHS521 Ensure a safe workplace for a work area

BSBXDB501 Support staff members with disability in the workplace

Group B

BSBAUD515 Evaluate and review compliance

BSBAUD516 Develop and monitor processes for the management of breaches in compliance requirements

BSBAUD601 Establish and manage compliance management systems

BSBCMM511 Communicate with influence

BSBCRT511 Develop critical thinking in others

BSBFIN501 Manage budgets and financial plans

BSBFIN801 Lead financial strategy development

BSBHRM522 Manage employee and industrial relations

BSBHRM613 Contribute to the development of learning and development strategies

BSBINS513 Contribute to records management framework
BSBLDR602 Provide leadership across the organisation
BSBOPS504 Manage business risk
BSBOPS505 Manage organisational customer service
BSBOPS602 Monitor corporate governance activities
BSBPEF501 Manage personal and professional development
BSBPMG530 Manage project scope
BSBPMG631 Manage program delivery
BSBPMG634 Facilitate stakeholder engagement
BSBPRC505 Manage ethical procurement strategy
BSBSTR801 Lead innovative thinking and practice
BSBSTR802 Lead strategic planning processes for an organisation
BSBSUS511 Develop workplace policies and procedures for sustainability
BSBTEC501 Develop and implement an e-commerce strategy
BSBXCM501 Lead communication in the workplace
BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB60215 Advanced Diploma of Business.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB60220 Advanced Diploma of Conveyancing

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who are responsible for conveyancing work, team leadership and/or the management of a practice. These individuals may be a Licensed Conveyancer or Settlement Agent.

These individuals apply specialist skills and knowledge in a range of situations to deal with complex situations and issues. They work across a broad range of technical and management functions with accountability for personal outputs and may also be responsible for team outcomes.

Licensing/Regulatory Information

Conveyancing is a licensed occupation. Licensing regimes for conveyancers differ between States and Territories in Australia. Contact the relevant licensing body for advice to determine the most appropriate pathway to satisfy licensing requirements within a particular State or Territory.

Entry Requirements

Nil

Packaging Rules

Total number of units = 15

9 core units plus

6 elective units, of which:

- 3 elective units must be selected from Group A
- 1 elective unit must be selected from Group B
- for the remaining 2 elective units:
 - up to 2 units may be selected from Groups A and B
 - if not listed, up to 2 units may be selected from a Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCNV511 Take instructions in relation to a conveyancing transaction

BSBCNV512 Finalise the conveyancing transaction

BSBCNV611 Interpret a legal document and provide advice in a conveyancing transaction

BSBCNV612 Identify and apply legal requirements for a conveyancing transaction

BSBCNV613 Prepare legal documents for a conveyancing transaction

BSBCNV614 Apply principles of trust accounting

BSBCNV615 Interpret search results for a conveyancing transaction

BSBCNV616 Comply with tax obligations in a conveyancing transaction

BSBLEG522 Apply legal principles in contract law matters

Elective units

Group A – Conveyancing

BSBLEG421 Apply understanding of the Australian legal system

BSBLEG523 Apply legal principles in tort law matters

BSBLEG528 Apply legal principles in property law matters

BSBLEG529 Apply legal principles in corporation law matters

FNSACC413 Make decisions in a legal context

FNSINC401 Apply principles of professional practice to work in the financial services industry

Group B – Transferable Skills

BSBAUD601 Establish and manage compliance management systems

BSBESB402 Establish legal and risk management requirements of new business ventures

BSBFIN501 Manage budgets and financial plans

BSBOPS504 Manage business risk

BSBPEF501 Manage personal and professional development

FNSORG601 Negotiate to achieve goals and manage disputes

FNSORG602 Develop and manage financial systems

FNSPRM601 Establish, supervise and monitor practice systems to conform with legislation and regulation

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to:

- BSB52015 Diploma of Conveyancing
- BSB61115 Advanced Diploma of Conveyancing.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB60320 Advanced Diploma of Human Resource Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who provide leadership and support strategic direction in the human resources activities of an organisation. Their knowledge base may be highly specialised or broad within the human resources field. The job roles that relate to this qualification may include Human Resources Manager and Senior Human Resources Business Partner.

Responsibilities are likely to be determined at a workplace level. Some smaller organisations may require employees to work across all aspects of human resources. In larger organisations, individuals may manage a single human resources function.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed one of the following qualifications: BSB50320 Diploma of Human Resource Management; or BSB50618 Diploma of Human Resources Management (or a superseded equivalent version).

or

Have four years equivalent full-time relevant work experience.

Packaging Rules

Total number of units = 10

6 core units plus

4 elective units, of which:

- 3 elective units must be selected from the elective units listed below
- for the remaining 1 elective unit:

- up to 1 unit may be selected from the elective units listed below
- if not listed, 1 unit may be selected from a Diploma or Advanced Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCRT611 Apply critical thinking for complex problem solving

BSBFIN601 Manage organisational finances

BSBHRM611 Contribute to organisational performance development

BSBHRM612 Contribute to the development of employee and industrial relations strategies

BSBHRM614 Contribute to strategic workforce planning

BSBLDR601 Lead and manage organisational change

Elective units

BSBHRM613 Contribute to the development of learning and development strategies

BSBHRM615 Contribute to the development of diversity and inclusion strategies

BSBLDR602 Provide leadership across the organisation

BSBOPS504 Manage business risk

BSBOPS601 Develop and implement business plans

BSBST601 Manage innovation and continuous improvement

BSBTEC601 Review organisational digital strategy

BSBTWK601 Develop and maintain strategic business networks

BSBWHS521 Ensure a safe workplace for a work area

BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB60915 Advanced Diploma of Management (Human Resources).

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB60420 Advanced Diploma of Leadership and Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who apply specialised knowledge and skills, together with experience in leadership and management, across a range of enterprise and industry contexts.

Individuals at this level use initiative and judgement to plan and implement a range of leadership and management functions, with accountability for personal and team outcomes within broad parameters.

They use cognitive and communication skills to identify, analyse and synthesise information from a variety of sources and transfer their knowledge to others, and creative or conceptual skills to express ideas and perspectives or respond to complex problems.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed a Diploma or Advanced Diploma from the BSB Training Package (current or superseded equivalent versions).

or

Have two years equivalent full-time relevant workplace experience in an operational or leadership role in an enterprise.

Packaging Rules

Total number of units = 10

5 core units plus

5 elective units, of which:

- 3 elective units must be selected from the elective units listed below

- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selected from an Advanced Diploma or above, from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCRT611 Apply critical thinking for complex problem solving

BSBLDR601 Lead and manage organisational change

BSBLDR602 Provide leadership across the organisation

BSBOPS601 Develop and implement business plans

BSBSTR601 Manage innovation and continuous improvement

Elective units

BSBCMM511 Communicate with influence

BSBCRT511 Develop critical thinking in others

BSBHRM613 Contribute to the development of learning and development strategies

BSBHRM614 Contribute to strategic workforce planning

BSBHRM615 Contribute to the development of diversity and inclusion strategies

BSBPEF501 Manage personal and professional development

BSBPMG633 Provide leadership for the program

BSBPMG637 Engage in collaborative alliances

BSBSTR602 Develop organisational strategies

BSBSTR801 Lead innovative thinking and practice

BSBSTR802 Lead strategic planning processes for an organisation

BSBSUS601 Lead corporate social responsibility

BSBTEC601 Review organisational digital strategy

BSBXCM501 Lead communication in the workplace

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB61015 Advanced Diploma of Leadership and Management.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB60520 Advanced Diploma of Marketing and Communication

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who provide leadership and support strategic direction in the marketing and communications activities of an organisation. Their knowledge base may be highly specialised or broad within the marketing and communications field. Typically, they are accountable for group outcomes and the overall performance of the marketing and communication, advertising or public relations functions of an organisation.

This qualification applies to individuals in full-time marketing roles, as well as those who are responsible for an organisation's marketing in addition to other duties.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed the following units (or equivalent competencies): BSBMKG541 Identify and evaluate marketing opportunities; BSBMKG542 Establish and monitor the marketing mix; BSBMKG552 Design and develop marketing communication plans; BSBMKG555 Write persuasive copy; and BSBPMG430 Undertake project work. Equivalent competencies are predecessors to these units, which have been mapped as equivalent.

or

Have four years equivalent full-time relevant work experience.

Packaging Rules

Total number of units = 12

4 core units plus

8 elective units, of which:

- 2 elective units must be selected from Group A

- 3 elective units must be selected from Group B
- for the remaining 3 elective units:
 - up to 3 units may be selected from Groups A and B
 - if not listed, up to 3 units may be selected from a Diploma or above from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBMKG621 Develop organisational marketing strategy

BSBMKG622 Manage organisational marketing processes

BSBMKG623 Develop marketing plans

BSBTWK601 Develop and maintain strategic business networks

Elective units

Group A – Marketing

BSBMKG624 Manage market research

BSBMKG625 Implement and manage international marketing programs

BSBMKG626 Develop advertising campaigns

BSBMKG627 Execute advertising campaigns

BSBMKG628 Lead organisational public relations

Group B – Transferable Skills

BSBCRT512 Originate and develop concepts

BSBCRT611 Apply critical thinking for complex problem solving

BSBFIN501 Manage budgets and financial plans

BSBLDR601 Lead and manage organisational change

BSBOPS601 Develop and implement business plans

BSBSTR601 Manage innovation and continuous improvement

BSBTEC601 Review organisational digital strategy

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB61315 Advanced Diploma of Marketing and Communication.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB60619 Advanced Diploma of Work Health and Safety

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Updated superseded elective units. |
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Qualification Description

This qualification reflects the role of individuals who apply advanced practical knowledge and skills to coordinate, facilitate and maintain a work health and safety (WHS) program. It is suited to those who possess significant work health and safety skills and knowledge; and wish to consolidate and build pathways to further educational and/or employment opportunities.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

All BSB51319 Diploma of Work Health and Safety core units or equivalent competencies. Equivalent competencies are predecessors to four of the following units, which have been mapped as equivalent. Note: BSBWHS519 is new to the core of the Diploma, equivalent to its previous version, and a requirement for entry into the Advanced Diploma.

- BSBWHS513 Lead WHS risk management
- BSBWHS515 Lead initial response to and investigate WHS incidents
- BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system
- BSBWHS519 Lead the development and use of WHS risk management tools
- BSBWHS522 Manage WHS consultation and participation processes.
-

Packaging Rules

Total number of units = 11

5 core units plus

6 elective units, of which:

- at least 3 elective units must be from Group A
- for the remaining 3 units:
 - up to 3 units may be selected from Group B
 - if not listed, 1 unit may be selected from a Diploma or Advanced Diploma from any currently endorsed Training Package or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the Australian Qualifications Framework (AQF) alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBWHS612 Develop and implement a strategy to support a positive WHS culture

BSBWHS613 Evaluate the WHS performance of an organisation

BSBWHS614 Conduct a WHS audit under the guidance of a lead auditor

BSBWHS616 Apply safe design principles to control WHS risks

BSBWHS617 Apply ergonomics to manage WHS risks

Elective units

Group A

BSBAUD601 Establish and manage compliance management systems

BSBLDR602 Provide leadership across the organisation

BSBWHS611 Develop and implement strategies that support work-related psychological health and safety

BSBWHS631 Apply occupational hygiene principles to manage WHS risks

Group B

BSBINS601 Manage knowledge and information

BSBLDR601 Lead and manage organisational change

BSBPEF502 Develop and use emotional intelligence

BSBPMG530 Manage project scope

BSBPMG634 Facilitate stakeholder engagement

BSBST601 Manage innovation and continuous improvement

BSBST602 Develop organisational strategies

TAEDES501 Design and develop learning strategies

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to BSB60615 Advanced Diploma of Work Health and Safety.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB60720 Advanced Diploma of Program Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who apply specialised knowledge and skills, together with experience in program management across a range of enterprise and industry contexts. The job roles that relate to this qualification include Program Manager.

Individuals in these roles are responsible for managing or directing a program to achieve organisational objectives. A program is defined as a set of interrelated projects, each of which has a project manager.

Individuals at this level use initiative and judgement to direct, plan, and lead a range of program functions, with accountability for personal and team outcomes within broad parameters. They use cognitive and communication skills to identify, analyse and synthesise information from a variety of sources and transfer their knowledge to others, and creative or conceptual skills to express ideas and perspectives or respond to complex problems.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed one of the following qualifications: BSB50820 Diploma of Project Management; or BSB51415 Diploma of Project Management (or a superseded equivalent version).

or

Have completed two years equivalent full-time relevant workplace experience at a significant level within a project or program environment within an enterprise.

Packaging Rules

Total number of units = 12

4 core units plus

8 elective units, of which:

- 6 elective units must be selected from the elective units listed below
- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selective from an Advanced Diploma or above, from this or any other currently endorsed Training Package qualification or accredited course
 - if not listed, 1 unit may be selected from a Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBPMG630 Enable program execution

BSBPMG634 Facilitate stakeholder engagement

BSBPMG635 Implement program governance

BSBPMG636 Manage benefits

Elective units

AHCBUS615 Implement a monitoring, evaluation and reporting program

BSBAUD601 Establish and manage compliance management systems

BSBCRT611 Apply critical thinking for complex problem solving

BSBFIN601 Manage organisational finances

BSBINS601 Manage knowledge and information

BSBLDR601 Lead and manage organisational change

BSBPEF502 Develop and use emotional intelligence

BSBPMG631 Manage program delivery

BSBPMG632 Manage program risk

BSBPMG633 Provide leadership for the program

BSBPMG637 Engage in collaborative alliances

BSBSTR601 Manage innovation and continuous improvement

BSBSUS601 Lead corporate social responsibility

ICTICT612 Develop contracts and manage contract performance

ICTICT616 Develop communities of practice

PSPMGT006 Develop a business case

Qualification Mapping Information

Supersedes and is equivalent to BSB61218 Advanced Diploma of Program Management.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB80120 Graduate Diploma of Management (Learning)

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who apply highly specialised knowledge and skills in the field of organisational learning and capability development. Individuals in these roles generate and evaluate complex ideas. They also initiate, design and execute major learning and development functions within an organisation. Typically, they would have full responsibility and accountability for the personal output and work of others.

This qualification may apply to leaders and managers in an organisation where learning is used to build organisational capability. The job roles that relate to this qualification may also include RTO Manager and RTO Director.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Nil

Packaging Rules

Total number of units = 8

3 core units plus

5 elective units, of which:

- 3 elective units must be selected from the elective units listed below
- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selected from an Advanced Diploma, Graduate Certificate or Graduate Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBHRM613 Contribute to the development of learning and development strategies

BSBLDR811 Lead strategic transformation

TAELED803 Implement improved learning practice

Elective units

BSBCRT611 Apply critical thinking for complex problem solving

BSBFIN801 Lead financial strategy development

BSBHRM611 Contribute to organisational performance development

BSBINS603 Initiate and lead applied research

BSBLDR601 Lead and manage organisational change

BSBLDR812 Develop and cultivate collaborative partnerships and relationships

BSBOPS601 Develop and implement business plans

BSBSTR801 Lead innovative thinking and practice

PSPMGT012 Facilitate knowledge management

TAELED804 Review enterprise e-learning systems and solutions implementation

Qualification Mapping Information

No equivalent qualification. Supersedes but is not equivalent to:

- BSB80515 Graduate Certificate in Management (Learning)
- BSB80615 Graduate Diploma of Management (Learning).

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB80220 Graduate Diploma of Portfolio Management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who apply advanced knowledge and skills in a range of strategic portfolio management roles. The job roles that relate to this qualification may include Portfolio Manager.

Individuals in these roles have full responsibility and accountability for personal outputs and for the work or function of others. Individuals at this level make high-level autonomous decisions and use initiative and judgement to plan and implement a range of project, program and portfolio management functions in varied contexts.

They use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, in order to generate ideas and provide solutions to complex problems. They use communication skills to demonstrate their understanding of theoretical concepts and to transfer knowledge and ideas to others.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed a Diploma or Advanced Diploma qualification in related fields of study and 3 years equivalent full-time relevant workplace experience at a significant level of project or program leadership and management responsibility and/or complexity in an enterprise.

or

Have completed a Bachelor degree in related fields of study and 2 years equivalent full-time relevant workplace experience at a significant level of project or program leadership and management responsibility and/or complexity in an enterprise.

or

Have five years equivalent full-time relevant workplace experience at a significant level of leadership and management responsibility and/or complexity in an enterprise.

Packaging Rules

Total number of units = 8

4 core units plus

4 elective units, of which:

- 2 elective units must be selected from the elective units listed below
- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selected from a Graduate Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBPMG810 Prioritise projects and programs

BSBPMG811 Select and balance the portfolio

BSBPMG812 Manage and review portfolio performance

BSBPMG813 Govern the portfolio

Elective units

BSBFIN801 Lead financial strategy development

BSBLDR811 Lead strategic transformation

BSBLDR812 Develop and cultivate collaborative partnerships and relationships

BSBLDR813 Lead and influence ethical practice

BSBPMG814 Lead the portfolio

BSBPMG815 Manage portfolio communications and change

BSBPMG816 Manage portfolio resources

BSBPMG817 Manage portfolio risk

BSBST801 Lead innovative thinking and practice

Qualification Mapping Information

Supersedes and is equivalent to BSB80415 Graduate Diploma of Portfolio Management.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSB80320 Graduate Diploma of Strategic Leadership

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Qualification Description

This qualification reflects the role of individuals who apply advanced knowledge and skills in a range of strategic leadership and management roles.

Individuals at this level make high level autonomous decisions and use initiative and judgement to plan and implement a range of leadership and management functions in varied contexts. They have full responsibility and accountability for personal outputs and for the work or function of others.

They use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, in order to generate ideas and provide solutions to complex problems. They use communication skills to demonstrate their understanding of theoretical concepts and to transfer knowledge and ideas to others.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this qualification at the time of publication.

Entry Requirements

Entry to this qualification is limited to those who:

Have completed a Diploma or Advanced Diploma qualification in related fields of study and 3 years equivalent full-time relevant workplace experience at a significant level of leadership and management responsibility and/or complexity in an enterprise.

or

Have completed a Bachelor degree in related fields of study and 2 years equivalent full-time relevant workplace experience at a significant level of leadership and management responsibility and/or complexity in an enterprise.

or

Have five years equivalent full-time relevant workplace experience at a significant level of leadership and management responsibility and/or complexity in an enterprise.

Packaging Rules

Total number of units = 8

2 core units plus

6 elective units, of which:

- 4 elective units must be selected from the elective units listed below
- for the remaining 2 elective units:
 - up to 2 units may be selected from the elective units listed below
 - if not listed, up to 2 units may be selected from a Graduate Diploma from this or any other currently endorsed Training Package qualification or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBLDR811 Lead strategic transformation

BSBSTR802 Lead strategic planning processes for an organisation

Elective units

BSBFIN801 Lead financial strategy development

BSBHRM615 Contribute to the development of diversity and inclusion strategies

BSBINS603 Initiate and lead applied research

BSBLDR812 Develop and cultivate collaborative partnerships and relationships

BSBLDR813 Lead and influence ethical practice

BSBPMG810 Prioritise projects and programs

BSBPMG814 Lead the portfolio

BSBSTR801 Lead innovative thinking and practice

BSBSTR803 Establish business continuity management strategies

BSBTEC601 Review organisational digital strategy

Qualification Mapping Information

Supersedes and is equivalent to BSB80215 Graduate Diploma of Strategic Leadership.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIC411 Communicate with the community

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required for board members to work in partnership with the community, including other organisations, to meet community needs and involve people in the organisation and its activities.

It applies to individuals who need to communicate with the community in their role as a member of a board of governance of an Aboriginal and Torres Strait Islander organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Collect information from the community | 1.1 Convene a community forum 1.2 Use formal and informal community networks to share information 1.3 Encourage, respect and record community contributions 1.4 Follow organisational policies and procedures for confidential information |
| 2 Provide information to | 2.1 Provide information to the community about the organisation's |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| the community about the organisation's activities and board decisions | activities according to established protocols 2.2 Advise the community regularly of board decisions and the reasons behind them |
| 3 Identify issues jointly with the community | 3.1 Raise and discuss issues of importance with the community 3.2 Invite individuals and groups affected by issues to participate in community forums 3.3 Gather background information through relevant networks |
| 4 Identify options with the community | 4.1 Discuss and evaluate options for action with the community 4.2 Identify preferred options 4.3 Convey information on issues and preferred options to the board 4.4 Convey the board's response to the community |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---|--|
| Reading | 1.4, 2.1, 3.3 | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types |
| Writing | 1.1-1.3, 2.1, 2.2, 4.3, 4.4 | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to complete and update workplace documentation |
| Oral Communication | 1.1-1.3, 2.1, 2.2, 3.1-3.3, 4.1, 4.3, 4.4 | <ul style="list-style-type: none"> Uses active listening and questioning skills to confirm understanding for requirements Participates in a range of verbal exchanges using appropriate tone, language and syntax to address relevant stakeholders and disseminate information |
| Navigate the world of work | 1.4, 2.1 | <ul style="list-style-type: none"> Understands the nature and purpose of own role and associated responsibilities and recognises and follows implicit and explicit organisational policies and procedures |
| Interact with others | 1.1-1.3, 2.1, 2.2, 3.1-3.3, 4.1, 4.3, 4.4 | <ul style="list-style-type: none"> Recognises importance of building rapport to establish effective working relationships Recognises importance of taking audience, purpose |

| | | |
|-------------------|--------------------|--|
| | | and contextual factors into account when making decisions about what to communicate with whom, why and how |
| Get the work done | 1.1, 1.2, 3.3, 4.2 | <ul style="list-style-type: none"> • Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency and considering how to respond to input of others • May use online forums, blogs and social networking sites to connect with the community, following appropriate online etiquette • Actively contributes to group decision-making when required |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBATSIC411 Communicate with the community | BSBATSIC411C Communicate with the community | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIC411 Communicate with the community

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- facilitate good communication channels with the community
- present information in an appropriate format for the community.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline community consultation methods
- explain the concept of community control of organisations and how it may impact communication requirements with the community
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that can impact methods of communication with the community
- explain effective communication strategies for sharing information with individuals and groups
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact communication methods
- outline information gathering, analysis and presentation methods
- identify organisational policies and procedures on communicating with community and maintaining confidentiality of information
- list relevant protocols and cultural responsibilities when communicating with community.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- examples of issues considered by boards of governance, including community feedback
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIC412 Maintain and protect cultural values in the organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to work as a board member in a way that respects, maintains and protects aspects of culture within the organisation.

It applies to individuals responsible for maintaining and protecting cultural values in an organisation as part of their board role in monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Demonstrate knowledge of your culture | 1.1 Outline relevant traditional and cultural responsibilities in a manner appropriate to the audience 1.2 Follow accepted cultural protocols when undertaking board duties 1.3 Identify the role of Elders and their relationship to the organisation |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2 Demonstrate respect for cultural diversity | 2.1 Treat individuals and groups with diverse lifestyles, backgrounds, cultures and languages with respect and sensitivity 2.2 Accommodate cultural differences in dealing with other people |
| 3 Identify impacts of colonisation on Aboriginal and Torres Strait Islander culture | 3.1 Identify how changes in Aboriginal and Torres Strait Islander culture since colonisation impact the organisation and its members today 3.2 Recommend ways the organisation can help to restore, protect and maintain culture |
| 4 Apply Aboriginal and Torres Strait Islander cultural practices to governance processes | 4.1 Identify relevant Aboriginal and Torres Strait Islander cultural practices that contribute to effective governance of organisations 4.2 Work with other board members to incorporate relevant Aboriginal and Torres Strait Islander cultural practices into organisation's governance processes |
| 5 Deal with potential and actual cultural exploitation | 5.1 Identify examples of potential and actual harm 5.2 Work with other board members to develop strategies for responding to potential and actual damage to cultural integrity |
| 6 Deal with potential and actual stereotyping and prejudice | 6.1 Identify areas of potential and actual social conflict as a consequence of stereotyping and prejudice 6.2 Work with other board members to develop strategies toward reconciliation in consultation with appropriate individuals or groups in targeted areas |
| 7 Determine effects of new legislation and policy on the organisation | 7.1 Assess the potential impact of new and proposed legislation and policy on the organisation and its members 7.2 Develop strategies to respond to new and proposed legislation and policy |
| 8 Determine impact of development on culture | 8.1 Identify relevant social, technical, economic and political changes that may impact the activities of the organisation 8.2 Assess current and future impact of development on culture 8.3 Develop strategies to maximise positive impact, and prevent or minimise negative impact on culture |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---|---|
| Reading | 3.1, 4.1, 5.1, 6.1, 7.1, 8.1, 8.2 | <ul style="list-style-type: none"> Gathers, interprets and analyses text to assess key changes in legislation and policy and how they relate to the organisation and community |
| Writing | 1.1, 3.1, 3.2, 4.1, 4.2, 5.2, 6.2, 7.2, 8.1-8.3 | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to complete and update workplace documentation |
| Oral Communication | 1.1-1.3, 2.1, 2.2, 3.1, 3.2, 4.2, 5.2, 6.2, 7.1 | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges with people from diverse backgrounds in an effort to maintain and protect cultural values Uses listening and questioning skills to confirm understanding for requirements |
| Navigate the world of work | 1.2, 4.1, 7.1 | <ul style="list-style-type: none"> Understands nature and purpose of own role and associated responsibilities and recognises and follows implicit and explicit workplace protocols Appreciates implications of legal and regulatory responsibilities related to own work |
| Interact with others | 2.1, 2.2, 4.2, 5.2, 6.2 | <ul style="list-style-type: none"> Pays attention to behaviour of others, interpreting a broad range of verbal and non-verbal signals and asking some questions to help understand others' thoughts and feelings Cooperates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability |
| Get the work done | 1.3, 3.1, 3.2, 4.1, 5.1, 6.1, 7.2, 8.1-8.3 | <ul style="list-style-type: none"> Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency and considering how to respond to input of others Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts Recognises potential of new approaches to enhance work practices and outcomes and accepts need for change |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBATSIC412 Maintain and protect cultural values in the organisation | BSBATSIC412A Maintain and protect cultural values in the organisation | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIC412 Maintain and protect cultural values in the organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- undertake board duties according to cultural and legal responsibilities
- actively contribute to discussions and decision making
- manage time and stress effectively to participate in board activities.
- offer appropriate information to others about cultural protocols
- develop strategies to restore, protect and maintain cultural values in the organisation
- identify signs of stress, implement stress-management strategies, and evaluate the effectiveness of chosen strategies.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain Aboriginal and Torres Strait Islander cultural governance practices that may affect the effective governance of organisations
- outline basic information on intellectual property rights and copyright law in relation to cultural knowledge and objects
- describe concept of community control of organisations and how it may impact protection of cultural values
- describe concepts of stereotyping and prejudice and their impacts on individuals
- identify cultural context in which Aboriginal and Torres Strait Islander boards operate
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact the maintenance and protection of cultural values in an organisation
- explain how historical factors, such as colonisation, have had an impact on local community members and the organisation

- outline provisions of federal, state or territory legislation and funding body requirements that may impact decision-making
- identify relevant protocols and cultural responsibilities of board members
- summarise social, technical, economic, legislative and political changes likely to occur in the short to medium term that could impact the activities of the organisation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- rules of the constitution
- legislation, codes of conduct and policies and procedures relevant to board activities
- interaction with others

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIC511 Plan and conduct a community meeting

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to plan and conduct community meetings the board initiates or facilitates.

It applies to individuals who need to communicate with community members in their role of monitoring and guiding activities of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Negotiate the basis of a meeting and plan event | 1.1 Undertake consultation on purpose, location, date and time of proposed meeting with appropriate people 1.2 Develop a broad agenda and list of invited guests in consultation with appropriate people 1.3 Communicate details of meeting to the community, invited guests and other key people and groups 1.4 Plan transport and other arrangements to maximise attendance 1.5 Address requirements of people with special needs to ensure |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------|--|
| | equity and access |
| 2 Conduct meeting | 2.1 Follow community procedures for choosing a chairperson for the meeting 2.2 Follow agenda and relevant meeting protocols 2.3 Acknowledge all points of view through appropriate meeting processes of discussion and documentation 2.4 Encourage full participation 2.5 Seek consensus in decision-making 2.6 Manage difficult situations appropriately |
| 3 Record decisions | 3.1 Clearly outline meeting decisions being voted on to those present 3.2 Clarify recommended actions resulting from decisions with participants 3.3 Identify people and organisations responsible for actions 3.4 Record decisions and recommended actions |
| 4 Communicate outcomes | 4.1 Share meeting outcomes with board, members and relevant others 4.2 Encourage participants to use their networks to communicate information provided and decisions made at the meeting 4.3 Follow up people and organisations identified as responsible for actions to ensure they understand what is required 4.4 Report outcomes to participating Elders, community members and organisations through established channels |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|----------------------|--|
| Reading | 1.4, 2.1, 2.2 | <ul style="list-style-type: none"> Evaluates and integrates information from a variety of texts to construct purposeful meaning |

| | | |
|----------------------------|-------------------------------------|--|
| Writing | 1.1-1.4, 2.3, 3.4, 4.1, 4.4 | <ul style="list-style-type: none"> • Uses clear, specific and industry-related terminology to complete and update workplace documentation |
| Oral Communication | 1.1-1.3, 2.3, 2.5, 3.1-3.3, 4.1-4.4 | <ul style="list-style-type: none"> • Participates in verbal exchanges of ideas/solutions and uses clear language and suitable tone to address and disseminate relevant information to a wide variety of individuals |
| Navigate the world of work | 2.1, 2.2 | <ul style="list-style-type: none"> • Monitors adherence to community protocols and procedures • Considers own role in terms of its contribution to broader goals of work environment |
| Interact with others | 1.5, 2.3, 2.4, 2.6 | <ul style="list-style-type: none"> • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion • Recognises and values individual differences, seeking to better understand other perspectives including those with special needs |
| Get the work done | 1.4, 2.6, 3.3 | <ul style="list-style-type: none"> • Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer term operational and strategic goals • When dealing with complex issues, may use intuition to identify general problem, switching to analytical processes to clarify key issues and using lateral thinking processes to generate possible solutions • Considers whether, and how, others should be involved, often using consultative and collaborative processes as an integral part of decision-making process |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIC511 Plan and conduct a community meeting | BSBATSIC511A Plan and conduct a community meeting | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIC511 Plan and conduct a community meeting

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- plan a community meeting to ensure participation of appropriate people
- conduct a community meeting that provides participants with an opportunity to share views
- put processes in place to inform appropriate people about what occurred at the meeting and outcomes of proposed action.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline community consultation methods
- explain concept of community control of organisations and how it may impact the conduct of community meetings
- describe consensus decision-making principles
- describe the cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact the conduct of community meetings
- outline decision-making strategies
- explain geographic, social, economic and political contexts in which particular organisations operate and how these may impact the conduct of community meetings
- identify organisational policies and procedures relevant to community meetings
- list provisions of federal, state or territory legislation and funding body requirements that influence decision-making
- identify relevant community bodies that might be included in community meetings

- describe relevant protocols and cultural responsibilities for conducting community meetings.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated community meeting
- examples of issues raised at community meetings
- meeting participants.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIL408 Manage a board meeting

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to plan for and conduct a regular board meeting and ensure outcomes of the meeting are implemented.

It applies to individuals who need to conduct board meetings in their role of monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Plan a board meeting | <p>1.1 Identify type of meeting to be conducted and any rules, cultural protocols, policies and procedures affecting its planning and conduct</p> <p>1.2 Prepare an agenda reflecting the business of the meeting, with consultation between the chair, secretary and manager</p> <p>1.3 Determine the date, time and location of the meeting, taking into consideration all relevant rules, cultural protocols, policies and procedures</p> <p>1.4 Issue invitations to members and guests in a timely manner to</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>maximise attendance</p> <p>1.5 Plan and implement transport and other arrangements to maximise attendance</p> <p>1.6 Circulate background papers prior to the meeting in an appropriate form and with adequate time for members to prepare for the meeting</p> |
| 2 Conduct a board meeting | <p>2.1 Ensure a quorum is present before commencing meeting</p> <p>2.2 Follow rules and cultural protocols</p> <p>2.3 Follow meeting agenda and timeframes</p> <p>2.4 Provide opportunities for participants to listen and speak, and show respect for different views</p> <p>2.5 Manage difficult situations that arise in a respectful and sensitive manner</p> <p>2.6 Use agreed decision-making processes to ensure decisions reflect participants' views</p> <p>2.7 Develop an action plan to implement decisions</p> |
| 3 Identify confidential business | <p>3.1 Advise board members when to observe required confidentiality</p> <p>3.2 Seek declarations of potential and real conflict of interest</p> |
| 4 Ensure minutes are taken | <p>4.1 Appoint a minute-taker</p> <p>4.2 Review minutes to ensure they contain required information</p> <p>4.3 Approve minutes and provide them to members and guests as appropriate</p> <p>4.4 Ensure procedures are in place to store minutes adequately and with appropriate access</p> |
| 5 Monitor the implementation of decisions | <p>5.1 Communicate decisions to relevant people</p> <p>5.2 Monitor the action plan to ensure completion</p> <p>5.3 Present reports of outcomes of implementation at board meetings</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|--|---|
| Reading | 1.1, 1.3, 1.5, 2.2, 2.3, 4.2, 4.4, 5.2 | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types to determine job requirements |
| Writing | 1.2-1.5, 2.7, 3.1, 3.2, 4.3, 5.1 | <ul style="list-style-type: none"> Records and reports key information related to planning and managing meetings, incorporating a range of simple and complex language |
| Oral Communication | 1.2, 2.1, 2.4-2.6, 3.1, 3.2, 4.1, 5.1, 5.3 | <ul style="list-style-type: none"> Uses specific and relevant language, appropriate tone and suitable syntax to clearly articulate issues Uses active questioning and listening techniques to confirm understanding |
| Navigate the world of work | 1.1, 1.3, 2.2 | <ul style="list-style-type: none"> Understands how own role meshes with others and contributes to broader work goals Recognises and follows explicit and implicit protocols and meets expectations associated with own role |
| Interact with others | 1.4, 2.4, 2.5, 4.3, 5.1, 5.3 | <ul style="list-style-type: none"> Begins to recognise the implications of implicit rules governing who communicates with whom, how and for what purpose, including those associated with power and status Begins to recognise how personal, social and cultural factors may influence people's understanding of any communication, and is learning to question own interpretation and seek clarification when required Looks for ways of establishing connections and building genuine understanding with a diverse range of people |
| Get the work done | 1.1, 1.3-1.6, 2.6, 4.1, 4.4, 5.2 | <ul style="list-style-type: none"> Begins to recognise the importance of other stakeholders throughout the process and is learning to clarify goals with others, maintaining communication and managing expectations and understanding Sequences and schedules complex activities, monitoring implementation and managing relevant communication Carefully considers how others should be involved, often using consultative or collaborative processes as an integral part of the decision-making process In familiar contexts, responds intuitively to problems requiring immediate attention, quickly drawing on past experience to devise solutions Uses ideas proposed by others as provocations and stepping stones to new perceptions and ideas Communicates information and ideas with clarity, |

| | | |
|--|--|--|
| | | considering the nature and potential reach of various linkages, benefits and limitations |
|--|--|--|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---------------------------------------|--|---|--------------------|
| BSBATSIL408 Manage a board meeting | BSBATSIL408C Manage a board meeting | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIL408 Manage a board meeting

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- apply constitutional provisions when planning and conducting board meetings
- plan a meeting to maximise its effectiveness
- prepare and follow meeting agenda
- document and communicate meeting outcomes effectively.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain board meeting procedures, including documentation requirements
- outline board member roles and responsibilities
- describe the concept of community control of organisations and how it may impact conduct of meetings
- identify any conflict of interest
- list constitution provisions regarding conduct of meetings
- describe the cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that can impact conduct of meetings
- explain cultural processes and protocols relevant to conduct of meetings
- outline decision-making processes
- list geographic, social, economic and political contexts in which particular organisations operate and how these may impact conduct of meetings
- identify organisational policies and procedures relevant to the conduct of meetings.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of issues worked with by boards of governance
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIL411 Undertake the roles and responsibilities of a board member

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to meet the diverse roles and responsibilities of a board member.

It applies to individuals responsible for monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations in their role as a member of a board of governance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Work within structure of the organisation | 1.1 Identify core functions and structure of the organisation 1.2 Describe relationship between organisation, stakeholders and other organisations or entities 1.3 Identify individual responsibilities of board members 1.4 Perform designated board duties as per role description 1.5 Follow the board's decision-making processes |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2 Manage competing roles and responsibilities | <p>2.1 Identify differences between roles of governance and management</p> <p>2.2 Identify the relationship between board and staff and overlapping roles</p> <p>2.3 Identify and manage real and perceived conflict of interest due to competing roles and responsibilities</p> <p>2.4 Follow policies and procedures on confidentiality of information</p> |
| 3 Follow legal requirements when carrying out board duties | <p>3.1 Identify legislation under which the organisation operates</p> <p>3.2 Apply provisions of legislation relevant to governance of the organisation</p> <p>3.3 Comply with relevant aspects of corporation law and terms and conditions of funding agreements</p> <p>3.4 Adhere to the constitution of the organisation while undertaking workplace responsibilities</p> |
| 4 Monitor operations | <p>4.1 Monitor trends and outcomes in the community</p> <p>4.2 Identify and analyse outcomes for each operational area</p> <p>4.3 Use information provided to review effectiveness and efficiency of operations and associated policy</p> <p>4.4 Suggest changes to operations or policy if necessary</p> |
| 5 Receive and act on community and stakeholder feedback | <p>5.1 Gather and evaluate feedback from the community and stakeholders about operations of the organisation, and share with other board members</p> <p>5.2 Deal with feedback according to policies and procedures, and in consultation with management</p> <p>5.3 Support decisions of board and management where applicable</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|-------|----------------------|-------------|
|-------|----------------------|-------------|

| | | |
|----------------------------|---|---|
| Reading | 1.1, 1.3, 2.1, 2.2, 2.4, 3.1-3.4, 4.1-4.3, 5.1, 5.2 | <ul style="list-style-type: none"> Gathers, interprets and analyses information relating to core functions of the organisation, such as organisational goals, standards and values |
| Writing | 1.2, 4.4, 5.1, 5.3 | <ul style="list-style-type: none"> Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations |
| Oral Communication | 1.2-2.3, 4.4 | <ul style="list-style-type: none"> Participates in a verbal exchange of ideas and clearly articulates requirements using language, tone and syntax appropriate to audience and environment Uses active listening and questioning skills to confirm understanding |
| Navigate the world of work | 2.4, 3.1-3.4, 4.3, 5.2 | <ul style="list-style-type: none"> Appreciates implications of legal and regulatory responsibilities related to own work Recognises and follows explicit and implicit protocols and meets expectations associated with own role Understands nature and purpose of own role and associated responsibilities and how it contributes to the work of others in immediate work context |
| Interacts with others | 1.4, 5.3 | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating group interaction, influencing direction and taking a leadership role on occasion Follows accepted communication practices and protocols, adjusting personal communication style in response to the values, beliefs and cultural expectations of others |
| Get the work done | 1.1, 1.3-1.5, 2.1-2.3, 4.2, 5.1 | <ul style="list-style-type: none"> Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency and considering how to link to work of others Takes responsibility for outcomes of routine decisions related to own role Understands when to take responsibility for solving problems and when to consult with others |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|------------------------------------|-------------------------------------|----------------------------------|--------------------|
| BSBATSIL411 Undertake the roles | BSBATSIL411A Undertake the roles | Updated to meet Standards for | Equivalent unit |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|-------------------|--------------------|
| and responsibilities of a board member | and responsibilities of a board member | Training Packages | |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIL411 Undertake the roles and responsibilities of a board member

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- contribute to analysis and decision-making on issues affecting board and organisational performance
- work in accordance with organisational constitution, codes of conduct, legislation and internal policies and procedures
- manage conflicts of interest
- maintain open channels of communication between board and staff members.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe the concept of community control of organisations, and how it may impact roles and responsibilities of board members
- describe the cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how this may impact roles and responsibilities of board members
- outline decision-making processes
- list geographic, social, economic and political contexts in which particular organisations operate, and how these may impact roles and responsibilities of board members
- explain governance roles and responsibilities
- explain management roles and responsibilities
- describe the organisational history, structure, core functions, code of conduct, constitution, policies and procedures, and reporting processes
- outline provisions of legislation and funding body requirements influencing decision-making, and how these may impact roles and responsibilities of board members

- identify relevant protocols and cultural responsibilities, and how they may impact roles and responsibilities of board members
- describe roles and responsibilities of key board positions
- list terms and conditions of funding agreements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of issues boards of governance have worked on, including community feedback and strategic decisions
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIL412 Participate effectively as a board member

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to operate as a confident and responsible member of the board, respecting culture, contributing positively, working with others, seeing the big picture and managing personal stress.

It applies to individuals with a broad knowledge of the business or core functions of organisations, who contribute their skills and knowledge to monitoring and guiding the activities of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Act in accordance with cultural and professional boundaries | 1.1 Demonstrate respect for local history 1.2 Identify and follow community protocols 1.3 Adhere to personal legal responsibilities under corporation law 1.4 Follow the organisation's code of conduct 1.5 Identify and manage real and perceived conflict of interest |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| 2 Participate actively in board matters | 2.1 Plan for participation in board activities 2.2 Attend board meetings and other board activities regularly 2.3 Make positive and constructive contributions to discussions 2.4 Prepare for meetings and undertake assigned follow-up actions |
| 3 Encourage and respect contributions from others | 3.1 Listen to and consider others' points of view 3.2 Represent the community's views objectively 3.3 Seek consensus when decision-making |
| 4 Work with the wider community | 4.1 Keep up-to-date with local Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander issues 4.2 Identify and undertake cooperative actions involving other groups 4.3 Demonstrate respect for values, policies and processes of other groups |
| 5 Manage stress | 5.1 Recognise signs of stress in self and others 5.2 Identify potential and actual sources of stress 5.3 Implement stress-reduction strategies if required 5.4 Evaluate the effectiveness of stress-reduction strategies and make changes if required |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|------------------------------|--|
| Reading | 1.3, 1.4, 2.1, 2.4, 4.1, 4.2 | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied within a board environment |
| Writing | 2.4, 4.2 | <ul style="list-style-type: none"> Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations |
| Oral Communication | 2.3, 3.1, 3.2, 4.1, 4.3 | <ul style="list-style-type: none"> Uses objective language and positive tone to clearly articulate issues |

| | | |
|----------------------------|------------------------------|---|
| | | <ul style="list-style-type: none"> • Uses active questioning and listening techniques to confirm understanding |
| Navigate the world of work | 1.2-1.4 | <ul style="list-style-type: none"> • Appreciates the implications of legal and regulatory responsibilities related to own work • Recognises and follows explicit and implicit protocols and meets expectations associated with own role • Understands nature and purpose of own role and associated responsibilities and how it contributes to the work of others in immediate work context |
| Interact with others | 1.5, 3.3, 4.2, 4.3, 5.1-5.3 | <ul style="list-style-type: none"> • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and occasionally taking a leadership role • Recognises some strengths and weaknesses of own interpersonal skills in work contexts and may identify one or more areas to develop • Identifies and addresses areas of need, monitoring progress by observing the reactions of others and seeking explicit feedback • Follows accepted communication practices and protocols, adjusting personal communication style in response to values, beliefs and cultural expectations of others |
| Get the work done | 2.1, 2.2, 2.4, 3.3, 4.1, 5.4 | <ul style="list-style-type: none"> • Plans a range of routine and some non-routine tasks accepting stated goals and aiming to achieve them efficiently • Considers how others should be involved in decision-making process often using consultative and collaborative processes as an integral part of the activity • Recognises and anticipates an increasing range of familiar problems, their symptoms and causes, actively looking for early warning signs and implementing contingency plans |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| BSBATSIL412 Participate effectively as a board | BSBATSIL412A Participate effectively as a board member | Updated to meet Standards for Training Packages | Equivalent unit |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|----------|--------------------|
| member | | | |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIL412 Participate effectively as a board member

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- undertake board duties according to cultural and legal responsibilities
- actively contribute to board discussions and decision-making processes
- work collaboratively with broader community
- manage time and stress effectively to participate in board activities.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline key historical events of significance to the local community
- identify code of conduct and organisational policies and procedures with regard to participation in board activities
- list provisions of relevant corporation law relating to personal responsibilities as a board member
- explain how to identify real and potential conflict of interest, and procedures to follow if these exist
- describe relevant protocols and cultural responsibilities impacting performance as a board member
- list relevant rules of the constitution
- describe sources and signs of stress and stress-management strategies
- outline stress-management strategies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- examples of codes of conduct
- participation on an actual or simulated board.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIL413 Review and apply the constitution

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to ensure the organisation's constitution is relevant and legal, that it is understood, and meeting changing needs.

It applies to individuals responsible for monitoring, guiding and undertaking decision-making activities of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Identify essential components of the constitution | 1.1 Explain key clauses to community members 1.2 Seek clarification of clauses from experts when required 1.3 Identify areas of activity of organisation not covered by constitution |
| 2 Ensure the constitution is legal | 2.1 Check constitution to ensure it is consistent with relevant law, with support of experts where required 2.2 Check constitution to ensure it is consistent with traditional lore |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------|---|
| 3 Apply the constitution | 3.1 Follow constitutional provisions 3.2 Check policies and programs to ensure they conform to constitution 3.3 Amend constitution as required in consultation with members and according to relevant procedures 3.4 Ensure formal documentation of changes made is maintained |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|-----------------------------|--|
| Reading | 1.2, 1.3, 2.1, 2.2, 3.1-3.4 | <ul style="list-style-type: none"> Interprets various texts to guide activities and decisions Analyses and evaluates validity of information to identify gaps or inconsistencies between texts |
| Writing | 1.2, 3.3, 3.4 | <ul style="list-style-type: none"> Collates and compiles material using clear and detailed language to convey specific information, requirements and recommendations |
| Oral Communication | 1.1, 1.2, 2.1-3.3 | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges using suitable tone, language and strategies to confirm, clarify or repair understanding Make constructive suggestions when required Elicits views and opinions of others by active listening and questioning |
| Navigate the world of work | 1.3, 2.1, 2.2, 3.1, 3.3 | <ul style="list-style-type: none"> Takes personal responsibility for adherence to legal/regulatory responsibilities relevant to own work context, and draws attention to any issues that may affect the organisation as a whole Recognises and follows explicit and implicit protocols and meets expectations associated with own role |
| Interact with others | 1.1, 1.2, 2.1, 2.2, 3.3 | <ul style="list-style-type: none"> Follows accepted communication practices and protocols, adjusting personal communication style in response to values, beliefs and cultural expectations of others |
| Get the work | 1.3, 3.2, 3.3 | <ul style="list-style-type: none"> Develops plans to manage relatively complex tasks with an awareness of how they may contribute to |

| | | |
|------|--|--|
| done | | <p>longer term operational strategic goals</p> <ul style="list-style-type: none">• Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account• Recognises and addresses some unfamiliar problems of increasing complexity within own scope, recognising when to seek expertise of others |
|------|--|--|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIL413 Review and apply the constitution | BSBATSIL413A Review and apply the constitution | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIL413 Review and apply the constitution

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- communicate effectively with others to ensure the constitution meets legal requirements and expectations of traditional lore
- document constitutional amendments according to workplace policies and procedures
- follow the constitution when undertaking board duties.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain the concept of community control of organisations and how it may impact provisions and application of the constitution
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that may impact content and application of constitution
- identify legislation and funding body requirements that can impact provisions of constitution
- list geographic, social, economic and political contexts in which particular organisations operate and how these may impact provisions and application of constitution
- explain how to put provisions of constitution into practice, in particular provisions about elections, membership, conduct of meetings (particularly annual general meetings) and reporting
- outline sources of support that can provide advice on legality and practical operations of aspects of the constitution.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- expert knowledge and resources relevant to constitution
- examples of constitutions used by Aboriginal and Torres Strait Islander organisations.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIL503 Manage conflict

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to manage conflict, both within the board and the organisation, and between the organization, the community and the wider community.

It applies to individuals who contribute their skills and knowledge to monitoring and guiding the activities of organisations in situations where there may be conflict between individuals or groups.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Identify existing and potential conflict | 1.1 Determine if conflict exists and its possible causes 1.2 Identify potential situations of future conflict 1.3 Develop strategies to prevent conflict |
| 2 Consider the conflict situation | 2.1 Identify the implications of conflict occurring 2.2 Identify responsibilities within the conflict 2.3 Develop resolution strategies in consultation with conflicting |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|---|
| | <p>parties</p> <p>2.4 Seek professional advice where needed, maintaining discretion and confidentiality</p> <p>2.5 Ensure wellbeing of individuals and the organisation is considered when developing resolution strategies</p> |
| 3 Use strategies to resolve conflict | <p>3.1 Promptly, appropriately and impartially implement strategies respecting the cultures of parties involved</p> <p>3.2 Allow sufficient time for conflict to be resolved</p> <p>3.3 Monitor and evaluate the process used to resolve the conflict</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------|----------------------------|--|
| Reading | 3.3 | <ul style="list-style-type: none"> Gathers, interprets and analyses information to measure the success of conflict-resolution strategies |
| Writing | 1.3, 2.3, 2.4, 3.3 | <ul style="list-style-type: none"> Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations |
| Oral Communication | 1.1-1.3, 2.1-2.5, 3.1, 3.3 | <ul style="list-style-type: none"> Articulates clearly using specific language and suitable tone to convey requirements for different audiences Uses active questioning and listening techniques to confirm understanding |
| Interact with others | 2.3-2.5, 3.1 | <ul style="list-style-type: none"> Recognises the importance of building rapport to establish effective working relationships Adapts personal communication style to build positive working relationships and show respect for opinions, values and particular needs of others Collaborates and negotiates with others to achieve agreeable outcomes, playing an active role in facilitating consensus in potentially contentious situations, seeking expert advice if required |
| Get the work done | 1.1-1.3, 2.1-2.3, 3.1-3.3 | <ul style="list-style-type: none"> Uses analytical processes to decide on a course of action, establishing criteria for deciding between options and seeking input and advice from others |

| | | |
|--|--|---|
| | | <p>before taking action</p> <ul style="list-style-type: none">• Allows sufficient time for difficulties to be resolved in an impartial and appropriate manner• Uses formal and informal processes to monitor implementation of solutions and reflect on outcomes• Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account |
|--|--|---|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|---|--------------------|
| BSBATSIL503 Manage conflict | BSBATSIL503C Manage conflict | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAT SIL503 Manage conflict

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- recognise causes of conflict
- apply conflict-resolution strategies
- manage conflict effectively.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain the concept of community control of organisations and its potential impact on how conflict is resolved
- outline conflict resolution theories and strategies, including mediation strategies
- describe the cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and its potential impact on how conflict is resolved
- describe geographic, social, economic and political contexts in which particular organisations operate and their potential impact on how conflict is resolved
- explain how equity and diversity principles might apply to the way conflict is resolved
- identify organisational policies, procedures and code of conduct relevant to conflict situations
- list potential causes of conflict board members may need to address when undertaking board duties
- outline sources of professional support available to assist in conflict resolution
- identify provisions of federal, state or territory legislation and funding body requirements that may impact decisions made to resolve conflict
- outline relevant protocols and cultural responsibilities that impact how conflict is resolved
- list provisions of the constitution relevant to the conflict situation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- examples of issues worked with by boards of governance that have the potential to involve conflict
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIL510 Appoint and work with a manager

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to appoint a manager for the organisation, define the respective roles of a manager and the board of management, and effectively work together on an ongoing basis.

It applies to individuals who are responsible for monitoring and guiding the activities of organisations about to appoint, or have recently appointed, a manager.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Establish recruitment and selection process | 1.1 Obtain expert advice on legal requirements relevant to recruiting and selecting staff 1.2 Identify organisational policies and procedures relevant to appointing staff 1.3 Develop an agreed process for recruiting and appointing staff that complies with legal and organisational requirements |
| 2 Recruit and select | 2.1 Develop a position description for the manager that includes |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|---|
| manager | <p>appropriate selection criteria</p> <p>2.2 Ensure advertising for the position complies with organisational policy and legal requirements</p> <p>2.3 Establish a selection panel that represents key stakeholders</p> <p>2.4 Develop appropriate interview questions, using independent assistance as required</p> <p>2.5 Participate in interviewing and selecting a manager who satisfies established selection criteria</p> |
| 3 Negotiate employment contract | <p>3.1 Check the employment contract developed to ensure it complies with organisational policy and legal requirements</p> <p>3.2 Benchmark salary and conditions against similar organisations</p> <p>3.3 Identify and document performance outcomes</p> <p>3.4 Review and renegotiate contract as required</p> |
| 4 Work with manager | <p>4.1 Ensure the manager is inducted</p> <p>4.2 Develop communication and reporting mechanisms between the manager and the board</p> <p>4.3 Develop protocols for decision-making and delegation of powers</p> <p>4.4 Establish policy and procedure to manage conflict and/or grievances between the manager and the board</p> <p>4.5 Regularly review the manager's performance in accordance with the employment contract</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|--------------------------------------|--|
| Reading | 1.2, 1.3, 2.2, 2.5, 3.1-3.4, 4.5 | <ul style="list-style-type: none"> Critically organises, evaluates and applies content from a range of structurally complex texts |
| Writing | 1.3, 2.1, 2.2, 2.4, 3.2-3.4, 4.2-4.5 | <ul style="list-style-type: none"> Selects text type, subject matter and language to suit specific audience and purpose |

| | | |
|----------------------------|---------------------------------------|---|
| Oral Communication | 1.1, 1.3, 2.3-2.5, 3.4, 4.1, 4.2, 4.5 | <ul style="list-style-type: none"> • Uses active listening and questioning techniques throughout the recruitment process • Disseminates specific information and provides feedback using appropriate vocabulary, tone and syntax |
| Numeracy | 3.2 | <ul style="list-style-type: none"> • Uses mathematical formula to calculate remuneration against industry benchmarks |
| Navigate the world of work | 1.1-1.3, 2.2, 3.1, 4.4 | <ul style="list-style-type: none"> • Monitors adherence to existing and self-created organisational policies and procedures • Considers own role in terms of its contribution to broader goals of work environment • Takes personal responsibility for adherence to all legislative requirements |
| Interact with others | 1.1, 4.1, 4.2, 4.5 | <ul style="list-style-type: none"> • Develops, selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders in a range of work contexts • Collaborates and negotiates with others to achieve joint outcomes playing an active role in facilitating consensus |
| Get the work done | 1.1-1.3, 2.3, 2.5, 4.1, 4.3 | <ul style="list-style-type: none"> • Recognises critical importance of clarifying, focusing and aligning goals and expectations and may use the process to build ownership of and broad commitment to achieving goals • Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account • Recognises and anticipates an increasing range of familiar problems, their symptoms and causes, and develops contingency plans to resolve issues |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBATSIL510 Appoint and work with a manager | BSBATSIL510A Appoint and work with a manager | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIL510 Appoint and work with a manager

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- work with fellow board members to source and select a suitable manager for the organisation
- demonstrate awareness of equal employment opportunity and anti-discrimination requirements when recruiting and selecting staff
- establish policy and procedures to ensure a good working relationship between the manager and the board.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline award structures for industrial agreements
- explain benchmarking of salaries and conditions
- describe concept of community control of organisations and how it may impact the recruitment and selection process
- outline contract management principles
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact recruitment and selection, and role of the manager
- identify documentation required for recruitment and selection
- explain equal employment opportunity and anti-discrimination legislation in relation to recruiting and selecting staff
- outline geographic, social, economic and political contexts in which particular organisations operate and how these may impact recruitment and selection, and work of the manager

- list interviewing techniques and selection processes
- identify organisational policies and procedures in relation to selection, appointment and management of staff, including grievance procedures
- describe performance management processes and models for giving feedback
- outline provisions of federal, state or territory legislation and funding body requirements that may impact recruitment and selection, and work of the manager
- identify relevant aspects of industrial relations legislation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of relevant recruitment, selection and performance management documents
- examples of issues that affect recruitment, selection and performance management.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIL511 Lead the organisation's strategic planning cycle

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to lead the strategic planning process of an organisation, and assist board members develop and implement a strategic planning cycle.

It applies to individuals responsible for planning, monitoring and guiding the activities of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Establish strategic planning process | 1.1 Agree to a documented strategic planning process with other board members 1.2 Identify and allocate resources to undertake strategic planning |
| 2 Develop and review organisation's values, vision and purpose | 2.1 Consult board members, management, staff, community and key stakeholders on values, vision and purpose of the organisation 2.2 Identify agreed values, vision and purpose of the organisation with other board members |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 2.3 Ensure organisation's values, vision and purpose are documented and endorsed by the board |
| 3 Analyse internal and external factors that could impact on organisation's strategic plan | 3.1 Review and evaluate the previous strategic plan 3.2 Identify and analyse community aspirations, interests and needs 3.3 Identify and analyse changing government policy and funding that might affect the organisation 3.4 Identify and analyse emerging and predicted trends 3.5 Identify and analyse potential for strategic alliances and partnerships 3.6 Seek advice from appropriate experts when necessary |
| 4 Establish strategic objectives and strategies | 4.1 Develop and agree on strategies and SMART objectives with other board members, consistent with outcomes of research and analysis undertaken 4.2 Ensure objectives and strategies are achievable and benchmarked against industry and community standards 4.3 Identify and document factors that may affect achievement of objectives |
| 5 Monitor and evaluate strategic performance | 5.1 Develop an implementation plan with other board members identifying targets, key performance indicators, performance standards, timelines and reporting requirements for the strategic planning period 5.2 Monitor and evaluate progress reports against the plan to identify successes and performance gaps 5.3 Review and revise strategic objectives and strategies with other board members where necessary |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|-------------------------|--|
| Reading | 2.3, 3.1-3.5, 4.1, 4.3, | <ul style="list-style-type: none"> Gathers, interprets and analyses textual information from a range of sources and identifies relevant and key |

| | | |
|----------------------------|---|--|
| | 5.2, 5.3 | information |
| Writing | 1.2, 2.2, 2.3, 3.1-3.6, 4.1, 4.3, 5.1-5.3 | <ul style="list-style-type: none"> • Uses appropriate vocabulary, grammatical structure and conventions to develop and update workplace documentation |
| Oral Communication | 1.1, 2.1-2.3, 3.2, 3.6, 4.1, 5.1, 5.3 | <ul style="list-style-type: none"> • Uses active questioning and listening techniques to elicit information and confirm understanding • Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate relevant information to a wide variety of individuals |
| Numeracy | 1.2, 4.2, 5.1, 5.2 | <ul style="list-style-type: none"> • Interprets numerical information and applies basic mathematical calculations to manage available resources and evaluate performance |
| Navigate the world of work | 3.1, 3.3 | <ul style="list-style-type: none"> • Monitors adherence to government policy and organisational procedures • Considers own role in terms of its contribution to broader goals of work environment |
| Interact with others | 1.1, 2.1, 2.2, 3.2, 3.6, 4.1, 5.1, 5.3 | <ul style="list-style-type: none"> • Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders in a range of work contexts • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective interactions |
| Get the work done | 1.2, 2.2, 3.1-3.5, 4.3, 5.1-5.3 | <ul style="list-style-type: none"> • Organises time and effort around priorities, results and realistic timeframes • Recognises importance of other stakeholders through the planning and implementing process, clarifying goals and proposed methodology with others, maintaining communication and managing expectations and understanding • Uses experiences as means to reflect how variables impact decision outcomes, and to gain insights into what constitutes 'good' judgement and an effective decision in different contexts • Uses ideas proposed by others as provocations and stepping stones to new perceptions and ideas |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|-----------------|--------------------|
| BSBATSIL511 Lead | BSBATSIL511A | Updated to meet | Equivalent unit |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|------------------------------------|--------------------|
| the organisation's strategic planning cycle | Lead the organisation's strategic planning cycle | Standards for Training Packages | |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIL511 Lead the organisation's strategic planning cycle

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- establish and maintain a strategic planning cycle with the board
- work with board, members and community to formulate strategic objectives and strategies
- ensure strategic performance is reviewed and monitored.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline benchmarking principles and approaches
- describe community consultation and engagement strategies
- explain components of strategic planning cycle
- describe concept of community control of organisations and how it may impact the strategic planning process and content of plans
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that could impact organisational planning
- list data collection methods
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact organisational planning
- outline organisational policies and procedures relevant to planning
- list relevant provisions of federal, state or territory legislation and funding body requirements that may influence decision-making
- identify relevant protocols and cultural responsibilities that impact the planning process
- explain roles and responsibilities of the board and management in organisational planning

- outline strategic planning principles, approaches and strategies, including setting objectives
- outline values, vision and purpose of the organisation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- office equipment and strategic planning resources
- examples of relevant strategic planning documents and issues that affect strategic planning.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIL512 Be a leader in the community

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to undertake a leadership role as a board member.

It applies to individuals with a broad knowledge of the business or core functions of organisations who contribute their skills and knowledge to monitoring and guiding the activities of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Lead by example | 1.1 Identify qualities of effective community leaders 1.2 Analyse own leadership style and performance 1.3 Use knowledge and skills to communicate effectively and demonstrate respect for community values 1.4 Identify changes that may affect the organisation and the community and discuss their implications 1.5 Implement change in a culturally-sensitive way |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 1.6 Identify how personal actions can impact others |
| 2 Access information about the community | 2.1 Gather and analyse information on social, cultural and economic needs of all sections of the community 2.2 Follow protocols for information sharing |
| 3 Encourage others to participate in the organisation's activities | 3.1 Encourage involvement of members of the community in the governance of the organisation 3.2 Encourage active community participation in the organisation 3.3 Promote a team and community approach relating to the activities of the organisation |
| 4 Determine the big picture on community issues | 4.1 Form opinions after researching background to community issues 4.2 Consider and discuss regional and national issues relating to Aboriginal and Torres Strait Islander people and the wider community 4.3 Consult Elders, traditional owners, government departments and others regarding community issues |
| 5 Provide directions and make decisions | 5.1 Identify and document options to address community and organisational issues 5.2 Present options for community discussion 5.3 Consider and evaluate other points of view when making clear, rational decisions reflecting community wishes 5.4 Promote consensus where there is difference of opinion 5.5 Inform Elders, traditional owners and others about how and why decisions are made 5.6 Implement and follow decisions made by the board |
| 6 Negotiate with others to promote community interests | 6.1 Give priority to community interests in dealing with government, business and other organisations 6.2 Represent the views of the board to others 6.3 Negotiate and document outcomes that represent the best possible solutions for the community at the time |
| 7 See both sides of community issues | 7.1 Analyse points of view expressed on an issue in terms of their impact on the community and the organisation 7.2 Include Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander points of view when making decisions |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| | 7.3 Support decisions that promote the long-term wellbeing of the whole community |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|--|---|
| Reading | 1.4, 2.1, 2.2, 4.1, 5.1 | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to individual, community and organisational requirements |
| Writing | 1.3, 1.5, 4.1, 5.1, 5.2, 5.5, 6.2, 6.3 | <ul style="list-style-type: none"> Integrates information from a number of sources and develops content that supports the purposes and format of the material using suitable grammatical structure and clear and logical language |
| Oral Communication | 1.3-1.5, 2.1, 3.1-3.3, 4.1-4.3, 5.2, 5.6, 6.2, 6.3, 7.2, 7.3 | <ul style="list-style-type: none"> Participates in culturally appropriate and respectful verbal exchanges with community members and key stakeholders using clear language, suitable syntax and tone to address and disseminate relevant information Uses active questioning and listening techniques to elicit information and confirm understanding |
| Navigate the world of work | 2.2 | <ul style="list-style-type: none"> Monitors adherence to organisational policies and protocols |
| Interact with others | 1.2, 1.3, 1.5, 1.6, 3.1-3.3, 4.3, 5.4, 5.5, 6.2, 6.3 | <ul style="list-style-type: none"> Sets time aside for self-reflection, recognising personal strengths and limitations and exploring beliefs and assumptions about own behaviour and that of others Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders in a range of work contexts Collaborates and negotiates with others to achieve joint outcomes, playing an active role in facilitating consensus Adapts personal communication style to show respect for the values, beliefs and cultural expectations of others |
| Get the work | 1.1, 1.2, 1.4, 2.1, 5.1, 5.3, 5.6, 6.1, | <ul style="list-style-type: none"> Develops flexible plans for complex, high-impact activities with strategic implications involving a |

| | | |
|------|----------|--|
| done | 7.2, 7.3 | <p>diverse range of stakeholders with potentially competing demands</p> <ul style="list-style-type: none"> • Pays close attention to involvement of others in decision-making process, judging when and where to make a unilateral decision, consult with others or collaborate to reach consensus • Uses every situation as an opportunity for extending insights and understanding, recognising any solution will have both intended and unintended consequences, and that cause and effect may not be closely or obviously linked • When dealing with complex issues, may use intuition to identify general problem area, switching to analytical processes to clarify goals and key issues and using lateral thinking techniques to generate possible solutions |
|------|----------|--|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIL512 Be a leader in the community | BSBATSIL512A Be a leader in the community | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIL512 Be a leader in the community

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- identify community needs, government policies and other factors impacting Aboriginal and Torres Strait Islander communities
- evaluate ideas and opinions, and make decisions in the best interests of the community
- provide direction and leadership to ensure involvement and community wellbeing.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline change management processes
- describe characteristics of effective community leadership
- explain concept of community control of organisations and how it may impact community leadership
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact community leadership
- identify current issues that might impact the organisation, its members and the community
- describe geographic, social, economic and political contexts in which particular organisations operate and how these may impact community leadership
- outline information about the community and its needs
- list information on government policy and other factors that affect Aboriginal and Torres Strait Islander communities
- describe various effective leadership styles
- identify relevant protocols and cultural responsibilities that impact community leadership
- explain traditional and current leadership models and theories.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of community issues relevant to boards of governance.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM412 Implement a businesslike approach

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to adopt a businesslike manner in all aspects of operations.

It applies to individuals with a broad knowledge of the business or core functions of organisations who contribute their skills and knowledge to monitoring and guiding activities of organisations in the Aboriginal and Torres Strait Islander community.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Identify businesslike attitudes | 1.1 Discuss and describe differences between businesslike and non-businesslike attitudes 1.2 Identify and document key differences 1.3 Identify and document differences within existing policies and programs |
| 2 Implement businesslike practices | 2.1 Modify and document present policies and programs appropriately to reflect a businesslike approach |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|---|
| | 2.2 Advise relevant stakeholders accordingly 2.3 Review, modify and document strategic and business plans |
| 3 Review operations regularly | 3.1 Review all operations from a businesslike perspective 3.2 Identify areas of concern and implement actions as appropriate |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|------------------------------|--|
| Reading | 1.2, 1.3, 2.1, 2.3, 3.1, 3.2 | <ul style="list-style-type: none"> Interprets information from a variety of sources to identify relevant and key information |
| Writing | 1.2, 1.3, 2.1-2.3, 3.1, 3.2 | <ul style="list-style-type: none"> Prepares strategic and business documentation for relevant stakeholders incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text |
| Oral Communication | 1.1, 2.2, 3.2 | <ul style="list-style-type: none"> Interacts effectively in verbal exchanges, using active listening and questioning, to convey and clarify information |
| Numeracy | 2.3, 3.1 | <ul style="list-style-type: none"> Selects and interprets familiar mathematical information to consider statistical data, trends and resource implications of proposed strategies and operations |
| Navigate the world of work | 1.3 | <ul style="list-style-type: none"> Monitors adherence to organisational policies and programs and considers own role in terms of its contribution to broader goals of work environment |
| Get the work done | 1.2, 1.3, 2.3, 3.1, 3.2 | <ul style="list-style-type: none"> Plans a range of routine tasks, accepting stated goals and aiming to achieve them efficiently Takes responsibility for the outcomes of routine decisions related directly to own role |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|--|---|--------------------|
| BSBATSIM412 Implement a businesslike approach | BSBATSIM412B Implement a businesslike approach | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM412 Implement a businesslike approach

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- apply an integrated demonstration of all elements of competency and their performance criteria
- assist the organisation to become more businesslike and self-sufficient.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact the conduct of community meetings
- describe consensus decision-making principles
- explain geographic, social, economic and political contexts in which particular organisations operate and how these may impact the conduct of community meetings
- list provisions of federal, state or territory legislation as legal entities and funding recipients which influence decision-making
- outline relevant business processes
- outline relevant organisational processes
- identify sources of business support services.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- community issues relevant to boards of governance.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM414 Oversee the organisation's annual budget

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to develop and implement the annual budget and enable the board to control the finances of the organisation.

It applies to individuals responsible for monitoring and planning the organisation's finances.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Gather and analyse relevant budget information | 1.1 Establish a budget working-group 1.2 Review and analyse previous year's budget performance 1.3 Gather budget planning information from relevant sources 1.4 Identify priorities in relation to organisation's vision and plans |
| 2 Identify and document income and expenditure | 2.1 Identify known sources of income 2.2 Identify new sources of income and amounts for new activities 2.3 Review expenditure for existing operations |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|--|
| | 2.4 Estimate expenditure for new initiatives and expansions 2.5 Identify potential problem areas 2.6 Ensure procedures are in place to document all identified items in a readily accessible and useful format |
| 3 Oversee budget preparation | 3.1 Contribute to budget development 3.2 Review budget documentation and clarify where required 3.3 Review draft budgets and propose modifications if required 3.4 Ensure contingency plans are included in the budget |
| 4 Review and finalise budget | 4.1 Ensure expenditure commitments are in line with final income figures 4.2 Work with other board members and management to finalise and approve annual budget 4.3 Present final annual budget to the community 4.4 Review and update budget regularly |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|--------------------------------------|---|
| Reading | 1.2-1.4, 2.1-2.6, 3.1-3.4, 4.1, 4.4 | <ul style="list-style-type: none"> Evaluates and interprets information from a range of relevant sources and identifies relevant and key information |
| Writing | 1.4, 2.4, 2.6, 3.1-3.3, 4.2, 4.4 | <ul style="list-style-type: none"> Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience |
| Oral Communication | 1.1, 4.2, 4.3 | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals Uses active listening and questioning to convey and clarify information |
| Numeracy | 1.2, 2.1-2.5, 3.1-3.4, 4.1, 4.2, 4.4 | <ul style="list-style-type: none"> Interprets numerical information and applies mathematical calculations to develop and implement |

| | | |
|----------------------|--|---|
| | | an organisation's annual budget |
| Interact with others | 1.1, 4.2, 4.3 | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role Cooperates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability |
| Get the work done | 1.2-1.4, 2.1, 2.2, 2.5, 2.6, 3.3, 3.4, 4.4 | <ul style="list-style-type: none"> Applies formal processes when planning more complex tasks, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints and the needs of others Automatically implements standard procedures for routine decisions Initiates standard procedures when responding to familiar problems within immediate context Understands and explicitly applies some basic principles of analytical and lateral thinking |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBATSIM414 Oversee the organisation's annual budget | BSBATSIM414C Oversee the organisation's annual budget | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM414 Oversee the organisation's annual budget

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- identify typical information to be included in a budget
- recognise when a budget indicates expenditure is greater than income, and suggest modifications that will bring it into balance
- prepare a balanced budget in collaboration with others, that meets the board's identified needs.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe components of a typical budget and standard budgeting procedures
- explain concept of community control of organisations and how it may apply to budgetary decision-making
- explain concept of financial contingency planning and how this can be undertaken
- outline current and potential sources of income to fund the organisation's activities
- identify geographic, cultural, social, economic and political contexts in which particular organisations operate and how this might impact budgetary decision-making
- list organisational plans that will affect the budget
- outline organisational vision, objectives and procedures in relation to sources of income for organisational activities
- identify provisions of federal, state or territory legislation and funding body requirements that impact how finances and assets can be used within the organisation
- explain relevant protocols and cultural responsibilities when making budgetary decisions.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- examples of budgets
- examples of relevant documents
- examples of projects that might be undertaken by a board.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM416 Oversee organisational planning

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to oversee the development of plans to guide the operations of the organisation.

It applies to individuals who are responsible for monitoring, guiding and planning the activities of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Gather relevant planning information | 1.1 Consult with community to identify needs, issues, visions and interests 1.2 Identify people with appropriate expertise both within and outside the organisation who could assist the planning process 1.3 Identify and obtain relevant planning information, including the organisation's current provision of services 1.4 Review the effectiveness of this provision in meeting organisational and community needs |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2 Set directions for planning | <p>2.1 Work with board members to set or review the vision, goals and objectives of the organisation</p> <p>2.2 Seek support of internal or external experts if required</p> <p>2.3 Analyse and use information to make planning decisions</p> <p>2.4 Identify type of planning activity required to meet needs of the organisation</p> <p>2.5 Identify key purpose and essential components of the planning activity</p> <p>2.6 Clarify roles of board, management and staff in the planning activity</p> |
| 3 Ensure plans and planning processes meet cultural objectives | <p>3.1 Check plans and planning processes to ensure they maintain and enhance cultural identity</p> <p>3.2 Check plans and planning processes to ensure they reflect cultural requirements and protocols promoting cultural respect</p> <p>3.3 Develop strategies to address areas where conflict may occur between cultural and economic requirements</p> <p>3.4 Check plans to ensure they reflect the vision and objectives of the organisation</p> |
| 4 Oversee development of plans | <p>4.1 Work with board members and senior staff to establish a plan-development process and timeframe</p> <p>4.2 Ensure adequate resources are available to develop plans</p> <p>4.3 Ensure plans meet legal and compliance requirements</p> <p>4.4 Ensure plans meet financial targets and funding requirements</p> <p>4.5 Ensure plans include risk management strategies</p> <p>4.6 Ensure plans include consideration of sustainability</p> <p>4.7 Monitor plan development and adjust where appropriate</p> |
| 5 Approve plans | <p>5.1 Work with other board members to approve agreed plan for implementation</p> <p>5.2 Communicate approved plans to the community</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---|--|
| Reading | 1.2-1.4, 2.1, 2.3-2.6, 3.1, 3.2, 3.4, 4.1, 4.3-4.7, 5.1 | <ul style="list-style-type: none"> Gathers, interprets and analyses textual information from a range of sources and synthesises ideas and concepts |
| Writing | 1.1, 2.1, 2.2, 4.1, 5.1, 5.2 | <ul style="list-style-type: none"> Researches, develops and documents strategies relating to planning and overseeing the operational plan Ensures vocabulary, grammatical structures and conventions are appropriate for target audience |
| Oral Communication | 1.1-1.4, 2.1, 2.2, 2.6, 4.1, 5.1, 5.2 | <ul style="list-style-type: none"> Uses appropriate techniques, including actively listening and questioning to convey and clarify information |
| Numeracy | 4.2, 4.4, 4.6 | <ul style="list-style-type: none"> Selects and uses mathematical problem-solving strategies to organise resource requirements, performance benchmarks and sustainability of the operational plan |
| Navigate the world of work | 4.3, 4.6 | <ul style="list-style-type: none"> Keeps up-to-date with legislation or regulations relevant to own rights and responsibilities and considers implications of these when planning and undertaking work |
| Interact with others | 1.1, 2.1, 2.2, 4.1, 5.1, 5.2 | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role Cooperates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability Recognises importance of building rapport to establish effective working relationships |
| Get the work done | 1.2, 1.3, 1.4, 2.3, 2.4, 2.5, 2.6, 3.1, 3.2, 3.4, 4.2, 4.4, 4.5, 4.6, 4.7 | <ul style="list-style-type: none"> Applies formal processes when planning more complex tasks, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints and the needs of others In more complex non-routine situations, uses a formal decision-making process with support, setting or clarifying goals, gathering information and identifying and evaluating best options against predetermined criteria Applies formal problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action Understands and explicitly applies some basic |

| | | |
|--|--|---|
| | | principles of analytical and lateral thinking |
|--|--|---|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| BSBATSIM416 Oversee organisational planning | BSBATSIM416A Oversee organisational planning | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM416 Oversee organisational planning

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- develop and document plans consistent with community needs, cultural requirements and organisational directions
- identify and access information relevant to planning activity
- identify and document risk management and sustainability strategies.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain board processes for decision-making
- explain concept of community control of organisations and how it may impact organisational planning
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values and how that could impact organisational planning
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact organisational planning
- outline methods for community consultation and engagement
- list methods for setting vision, goals and objectives
- explain organisation review processes
- identify potential funding sources to support organisational goals and objectives
- describe principles of risk management relevant to organisational planning
- list relevant provisions of federal, state or territory legislation and funding body requirements that influence decision-making and may impact organisational planning
- describe relevant organisational planning concepts

- outline relevant principles of sustainability
- identify relevant protocols and cultural responsibilities with respect to planning
- explain roles and responsibilities of the board and management in organisational planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- organisational plans.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM417 Implement organisational plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to guide the implementation of organisational plans.

It applies to individuals who are responsible for monitoring and guiding activities of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Secure resources and funding to implement organisational plans | 1.1 Review organisational plan to identify required resources and funding sources 1.2 Identify possible partnership arrangements 1.3 Follow organisation's policies, practices and procedures to obtain resources and funding to implement plans |
| 2 Oversee implementation of organisational plans | 2.1 Establish a plan for implementation 2.2 Identify roles and responsibilities of board members in implementation plan |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>2.3 Identify key performance indicators (KPIs) for plan implementation and use to monitor progress</p> <p>2.4 Establish internal reporting strategies to inform board members of implementation progress</p> <p>2.5 Undertake contingency planning in consultation with key stakeholders as required</p> <p>2.6 Ensure procedures are in place to document planning and implementation outcomes</p> |
| 3 Monitor, review and evaluate implementation | <p>3.1 Analyse implementation progress reports</p> <p>3.2 Develop strategies to address changing situations when necessary</p> <p>3.3 Make appropriate implementation decisions as required, including changes to plan</p> <p>3.4 Evaluate implementation of organisational plan</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|-----------------------------|---|
| Reading | 1.1-1.3, 2.2, 2.3, 3.1, 3.4 | <ul style="list-style-type: none"> Gathers, interprets and analyses a variety of textual information from a range of sources and identifies relevant and key information |
| Writing | 2.1, 2.4-2.6, 3.2, 3.3 | <ul style="list-style-type: none"> Uses clear vocabulary, grammatical structures and conventions appropriate for target audience when completing and updating workplace documentation |
| Oral Communication | 2.5 | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals Uses active listening and questioning to convey and clarify information |
| Numeracy | 1.1, 2.1, 2.3 | <ul style="list-style-type: none"> Interprets numerical information and applies mathematical calculations to determine resources, KPIs and time requirements |
| Navigate the | 1.3 | <ul style="list-style-type: none"> Monitors adherence to organisational policies and procedures and considers own role in terms of its |

| | | |
|-------------------|----------------------------|---|
| world of work | | contribution to broader goals of work environment |
| Get the work done | 1.1, 1.2, 2.1-2.5, 3.1-3.4 | <ul style="list-style-type: none"> Applies formal processes when planning more complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time, resource constraints and the needs of others In more complex non-routine situations, uses formal decision-making process with support, setting or clarifying goals, gathering information and identifying and evaluating best options against predetermined criteria Applies formal problem-solving processes, breaking complex issues into manageable parts and identifying and evaluating several options for action Understands and explicitly applies some basic principles of analytical and lateral thinking |

Range of Conditions

This section specifies different work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included.

| | |
|---------------------------------------|---|
| Plan for implementation must include: | <ul style="list-style-type: none"> key tasks and activities key milestones and deliverables, such as results and KPIs key stakeholders responsible person resources required timeline reporting requirements |
|---------------------------------------|---|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIM417 Implement organisational plans | BSBATSIM417A Implement organisational plans | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM417 Implement organisational plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- develop an implementation plan that clearly identifies key activities, personnel, outcomes, resource requirements and timelines
- establish strategies to monitor, review and evaluate implementation
- solve implementation problems that may affect the plan.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain concept of community control of organisations and how it may impact organisational planning
- outline contingency planning strategies
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that may affect the implementation of organisational plans
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact the viability of organisational plans
- outline the key elements of implementation plans
- list legislation and funding body requirements that may influence planning decisions
- explain methods for monitoring and reporting plan implementation
- outline organisational policies, practices and procedures relevant to development of organisational plans
- identify possible partnership arrangements with other organisations to achieve organisational objectives

- outline protocols and cultural responsibilities relevant to development of organisational plans
- describe roles and responsibilities of board members
- identify sources of funding and other key resources relevant to implementing organisational plans.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of relevant planning implementation documents
- examples of issues that affect planning implementation.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM418 Oversee financial management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to monitor and act on financial reports.

It applies to individuals who are responsible for monitoring and guiding financial management of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Interpret financial reports | 1.1 Ensure regular financial information is received from management in a form all board members can understand 1.2 Clarify purpose of financial reports and their key features with board members 1.3 Identify income shortfalls and expenditure overruns |
| 2 Evaluate financial reports | 2.1 Consider and discuss financial implications of reports with other board members and management 2.2 Compare data with previous reports and decisions 2.3 Compare year-to-date and end-of-financial-year data with |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | budgeted outcomes 2.4 Seek independent advice where necessary |
| 3 Recognise board responsibilities for assets | 3.1 Identify statutory responsibilities of board members for assets 3.2 Identify funding body restrictions on the acquisition, use and disposal of assets 3.3 Comply with statutory responsibilities and funding body requirements on assets |
| 4 Make decisions on finance | 4.1 Analyse recommendations on finances in terms of their impact on the organisation and its vision and objectives 4.2 Prioritise financial decisions against organisational objectives 4.3 Make decisions in accordance with the organisation's policy and legal and funding requirements 4.4 Ensure procedures are in place to document financial decisions |
| 5 Approve expenditures | 5.1 Check expenditure proposals are within budget and meet statutory and funding body requirements 5.2 Check the organisation's current financial situation 5.3 Approve expenditure only if it is consistent with budget, statutory and funding body requirements, and the organisation's financial situation |
| 6 Review financial decisions | 6.1 Monitor outcomes and actions from decisions 6.2 Identify and monitor external influences on budgets and finances 6.3 Ensure procedures are in place to document variations to financial agreements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|---|--|
| Reading | 1.3, 2.2, 2.3, 3.1-3.3, 4.1, 4.2, 4.4, 5.1-5.3, | <ul style="list-style-type: none"> Utilises understanding of distinguishing structures and features of a range of textual information and reflects on context, purpose and audience |

| | | |
|----------------------------|--|--|
| | 6.1-6.3 | |
| Writing | 4.2, 4.4, 5.3, 6.3 | <ul style="list-style-type: none"> Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience |
| Oral Communication | 1.2, 2.1, 2.4 | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals Uses active listening and questioning to convey and clarify information |
| Numeracy | 1.2, 1.3, 2.1-2.4, 3.1-3.3, 4.1-4.3, 5.1-5.3, 6.1, 6.2 | <ul style="list-style-type: none"> Selects and uses mathematical problem-solving strategies to read financial reports and calculations and oversee financial management of an organisation |
| Navigate the world of work | 3.1, 3.3, 4.3, 5.1, 5.3 | <ul style="list-style-type: none"> Keeps up-to-date with legislation or regulations relevant to own rights and responsibilities, and considers implications of these when planning and undertaking work Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment Understands how own role meshes with others and contributes to broader work goals |
| Interact with others | 1.1, 1.2, 2.1, 2.4 | <ul style="list-style-type: none"> Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Get the work done | 3.2, 4.1-4.4, 6.1-6.3 | <ul style="list-style-type: none"> Applies formal processes when planning more complex tasks, producing plans with logically sequenced steps, reflecting an awareness of resource constraints and the needs of others In more complex non-routine situations, uses a formal decision-making process with support, setting or clarifying goals, gathering information and identifying and evaluating best options against predetermined criteria Evaluates effectiveness of decisions on how well they meet stated goals Applies formal problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action Understands and explicitly applies some basic principles of analytical and lateral thinking |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIM418 Oversee financial management | BSBATSIM418A Oversee financial management | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM418 Oversee financial management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- understand a variety of financial reports
- monitor financial status of the organisation
- make financial decisions according to organisational vision and objectives that comply with legal and contractual requirements
- responsibly manage organisational assets.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain concept of community control of organisations and how it may impact financial decisions
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact financial decisions
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact financial decisions
- outline organisational procedures and processes regarding finances
- outline organisational vision and objectives
- identify previous budget performance and financial reports
- explain the purpose and components of financial reports
- list relevant protocols and cultural responsibilities when making financial decisions
- explain statutory and funding body requirements relevant to the organisation's financial decision-making

- outline statutory and funding body responsibilities in relation to financial reporting and assets.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- financial reports and other relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM419 Contribute to the development and implementation of organisational policies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to work with other board members to develop and implement the organisation's operational policies to serve the organisation and the community effectively.

It applies to individuals who are responsible for monitoring and guiding activities of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Design process for developing policy | 1.1 Work with other board members to establish a policy development group and develop a procedure for policy development 1.2 Consult the community where appropriate 1.3 Determine need for expert advice 1.4 Delegate tasks to appropriate people |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| 2 Obtain background information needed for policy development | 2.1 Identify key areas of operation requiring policy development 2.2 Review relevant previous board decisions 2.3 Identify and review additional information required |
| 3 Contribute to drafting of policy | 3.1 Provide input into drafting of policy for each area of organisation activity 3.2 Check policy to ensure it reflects the vision of the organisation and cultural issues 3.3 Check policy to ensure it meets legal, constitutional and funding requirements 3.4 Provide feedback to policy development group on draft policies |
| 4 Approve policy | 4.1 Provide an explanation of draft policy to others 4.2 Obtain and evaluate feedback 4.3 Propose amendments to draft policy where required in response to feedback 4.4 Work with board members to approve agreed policy 4.5 Ensure procedures are in place to document and store policy in an accessible form |
| 5 Implement policy | 5.1 Inform others of the board decision and the final policy 5.2 Review board decision to ensure it complies with policy 5.3 Evaluate organisational procedures to confirm consistency with policy |
| 6 Review and amend policy as required | 6.1 Review policy regularly to ensure organisation's vision and values are maintained 6.2 Propose amendments to policy where appropriate 6.3 Ensure policy changes are documented according to organisational procedures |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance | Description |
|-------|-------------|-------------|
|-------|-------------|-------------|

| | Criteria | |
|----------------------------|--|--|
| Reading | 2.2, 2.3, 5.2, 5.3, 6.1 | <ul style="list-style-type: none"> Gathers, interprets and analyses a variety of textual information from a range of sources and identifies relevant and key information |
| Writing | 1.1, 3.1, 3.4, 4.1, 4.3, 4.5, 5.1, 6.2, 6.3 | <ul style="list-style-type: none"> Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience |
| Oral Communication | 1.1, 1.2, 1.4, 3.1, 3.4, 4.1, 4.3, 4.4, 5.1, 6.2 | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals Uses active listening and questioning to convey and clarify information |
| Navigate the world of work | 2.1, 3.1-3.3, 4.3, 4.5, 5.3, 6.1-6.3 | <ul style="list-style-type: none"> Develops and adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment Understands own legal rights and responsibilities and is extending understanding of general legal principles applicable in work environment |
| Interact with others | 1.1, 1.2, 1.4, 3.1, 3.4, 4.1-4.4, 5.1 | <ul style="list-style-type: none"> Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role Cooperates and negotiates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability Recognises importance of building rapport to establish effective working relationships |
| Get the work done | 1.1-1.4, 2.1, 2.3, 3.2, 3.3, 6.1 | <ul style="list-style-type: none"> Applies formal processes when planning more complex tasks, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints and the needs of others In more complex non-routine situations, uses a formal decision-making processes with support, setting or clarifying goals, gathering information and identifying and evaluating best options against predetermined criteria Applies formal problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action Understands and explicitly applies some basic principles of analytical and lateral thinking |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| BSBATSIM419 Contribute to the development and implementation of organisational policies | BSBATSIM419A Contribute to the development and implementation of organisational policies | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM419 Contribute to the development and implementation of organisational policies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- work with others to implement a policy development process
- contribute to policy development processes
- inform others of new and changed policies
- review and amend policies as required.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain concept of community control of organisations and how it may impact organisational planning
- outline cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that could impact the development and implementation of policies
- describe equity and diversity principles that might need to be applied when developing and implementing policies
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact the development and implementation of organisational policies
- outline organisation's constitution, vision, purpose and current processes
- list provisions of relevant federal, state or territory legislation and funding body requirements relevant to the content of particular organisational policies
- outline protocols and cultural responsibilities that could impact the development and implementation of policies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of policies
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM420 Oversee asset management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to account for and manage the organisation's assets.

It applies to individuals responsible for ensuring the organisation's assets are effectively managed.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Develop and implement policies and procedures for management of assets | 1.1 Work with other board members and staff to develop policies and procedures for managing assets that comply with legal and contractual requirements 1.2 Follow policies and administrative procedures for purchase, use, storage, maintenance and disposal of assets |
| 2 Ensure asset records are established | 2.1 Ensure responsibility for establishing an asset register of organisation's movable assets, and recording and storage of asset documents is delegated by the board to an appropriate person or |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>persons</p> <p>2.2 Ensure the register has been established and appropriate asset documents are stored securely</p> |
| 3 Ensure assets and records are maintained | <p>3.1 Receive and review reports on assets to ensure they are up-to-date and complete</p> <p>3.2 Ensure appropriate procedures are in place and followed to undertake asset repairs</p> <p>3.3 Ensure appropriate procedures are in place and followed to report and document asset damage, loss or theft</p> <p>3.4 Develop an action plan to follow up asset management issues that arise</p> <p>3.5 Ensure asset records comply with funding providers' requirements</p> |
| 4 Ensure insurance cover is in place | <p>4.1 Ensure appropriate procedures are in place and followed to arrange and maintain insurance following asset acquisition</p> <p>4.2 Identify authorised signatories for claims for damage, loss or theft</p> <p>4.3 Ensure claims are submitted in a timely manner and include required evidence of loss</p> |
| 5 Oversee annual internal audit of assets | <p>5.1 Ensure items recorded in asset register are checked annually</p> <p>5.2 Ensure asset register is updated with current information following the internal audit</p> <p>5.3 Investigate discrepancies found in the asset register</p> <p>5.4 Propose changes to policies and procedures if required</p> |
| 6 Oversee acquisition and disposal of assets | <p>6.1 Approve acquisitions and disposal of assets in line with existing plans and budgets</p> <p>6.2 Ensure funding body requirements regarding asset acquisition and disposal are met</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance | Description |
|-------|-------------|-------------|
|-------|-------------|-------------|

| | Criteria | |
|----------------------------|--|---|
| Reading | 1.1, 1.2, 2.2, 3.1-3.3, 3.5, 4.1-4.3, 5.1-5.4, 6.1, 6.2 | <ul style="list-style-type: none"> Utilises understanding of distinguishing structures and features of a range of textual information and reflects on context, purpose and content |
| Writing | 1.1, 1.2, 2.1, 2.2, 3.1-3.5, 4.1, 4.3, 5.1-5.4, 6.1, 6.2 | <ul style="list-style-type: none"> Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience |
| Oral Communication | 1.1, 2.1, 5.3, 5.4, 6.1 | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals Uses active listening and questioning to convey and clarify information |
| Numeracy | 1.2, 2.2, 3.1, 5.1-5.3 | <ul style="list-style-type: none"> Identifies and interprets mathematical information to review asset reports and identify discrepancies |
| Navigate the world of work | 1.1, 1.2, 3.2, 3.3, 3.5, 4.1, 5.4, 6.2 | <ul style="list-style-type: none"> Keeps up-to-date with legislation or regulations relevant to own rights and responsibilities and considers implications of these when planning and undertaking work Develops, monitors and adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment Understands how own role meshes with others and contributes to broader work goals |
| Interact with others | 1.1, 2.1 | <ul style="list-style-type: none"> Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Get the work done | 2.1, 2.2, 3.1-3.4, 4.1-4.3, 5.3 | <ul style="list-style-type: none"> Applies formal processes when planning more complex tasks, producing plans with logically sequenced steps, reflecting an awareness of resource constraints and the needs of others Uses a formal decision-making process with support, setting or clarifying goals, gathering information and identifying and evaluating best options against predetermined criteria Evaluates effectiveness of decisions on how well they meet stated goals Recognises and anticipates an increasing range of familiar problems, their symptoms and causes, actively looking for early warning signs and implementing contingency plans Understands importance of secure information and |

| | | |
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| | | privacy in relation to own work and takes personal responsibility for identifying and managing risk factors |
|--|--|---|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIM420 Oversee asset management | BSBATSIM420A Oversee asset management | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM420 Oversee asset management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- work with others to develop policies and procedures for managing assets
- maintain and update a comprehensive asset register
- organise and maintain appropriate insurance for acquisitions
- undertake an annual audit of assets
- dispose of assets in accordance with all regulatory and organisational requirements.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline asset purchasing and disposal procedures
- explain asset auditing procedures
- describe funding body requirements with regard to assets
- identify geographic, cultural, social, economic and political contexts in which particular organisations operate and how that may impact the management of assets
- list relevant organisational procedures and processes with respect to assets
- outline provisions of federal, state or territory legislation and funding body requirements that impact management of assets
- explain record-keeping requirements with regard to assets
- describe relevant protocols and cultural responsibilities for management of assets.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- examples of asset registers, asset policies and procedures
- other relevant documents and reports.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM421 Support a positive and culturally appropriate workplace culture

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required by a board member to contribute to the development and maintenance of a positive and culturally appropriate workplace culture.

It applies to individuals responsible for monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Promote respect toward people in the workplace | 1.1 Promote cultural views and values in workplace 1.2 Treat individuals and groups from different backgrounds, cultures and languages with respect and sensitivity 1.3 Identify and support positive qualities of people 1.4 Take impact of board decisions on human values into account when making decisions 1.5 Identify how past experiences may impact people's behaviour, |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | skills and knowledge |
| 2 Provide support to others | 2.1 Identify the knowledge, skills and experience of others 2.2 Share own knowledge and skills with others 2.3 Resolve issues in culturally appropriate and sensitive ways 2.4 Use active listening skills when communicating 2.5 Encourage others to take on new challenges 2.6 Demonstrate approachability and openness to suggestions |
| 3 Promote an environment that encourages people to enhance their skills and knowledge | 3.1 Support others to achieve work goals 3.2 Develop and apply strategies to recognise achievements 3.3 Support others to undertake relevant professional development |
| 4 Encourage teamwork | 4.1 Develop strategies supporting a team approach 4.2 Clearly outline expectations of team members 4.3 Develop and apply strategies that recognise individuals' contributions to the team |
| 5 Reduce potential for cross-cultural misunderstandings | 5.1 Identify issues that may cause cross-cultural conflict or misunderstanding in workplace 5.2 Work with board members and manager to develop and implement strategies to reduce cross-cultural misunderstandings in workplace |
| 6 Provide constructive feedback | 6.1 Encourage provision of constructive feedback in workplace 6.2 Clarify with board members and management whose role it is to provide feedback to staff members about their performance 6.3 Provide feedback to people about their performance where appropriate |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|-------|----------------------|-------------|
| | | |

| | | |
|----------------------|---|---|
| Reading | 5.1 | <ul style="list-style-type: none"> Interprets information from a range of sources to identify relevant and key information |
| Writing | 1.1, 2.2, 3.2, 4.1-4.3, 5.2, 6.2, 6.3 | <ul style="list-style-type: none"> Develops content that supports the purposes and format of the material using appropriate grammatical structure and clear and logical language Ensures vocabulary and conventions used are appropriate for target audience |
| Oral Communication | 1.1-1.3, 2.1-2.6, 3.1,3.3, 4.2, 4.3, 5.1, 5.2, 6.1-6.3 | <ul style="list-style-type: none"> Uses influential language, suitable vocabulary and tone, to enhance meaning and effectiveness in a culturally appropriate manner Uses active listening and questioning techniques to convey and clarify information |
| Interact with others | 1.1-1.3, 1.5, 2.2, 2.5, 2.6, 3.1, 3.2, 4.1, 4.3, 5.2, 6.1-6.3 | <ul style="list-style-type: none"> Recognises and values individual differences, seeking to better understand other perspectives and judging when it is appropriate to modify own behaviour to create stronger rapport Looks for the strengths in others and finds ways to work with and build on these, sharing own knowledge and experience freely Appreciates and is open to feedback from others Demonstrates an increasing awareness of interplay of factors involved in any group interaction |
| Get the work done | 2.1, 2.3, 3.2, 4.1, 5.1 | <ul style="list-style-type: none"> Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer-term operational and strategic goals Considers whether and how others should be involved, often using consultative or collaborative processes as an integral part of decision-making When dealing with complex issues, may use intuition to identify the general problem, switching to analytical process to clarify goals and key issues and using lateral thinking processes to generate possible solutions |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIM421 Support a positive and culturally appropriate | BSBATSIM421A Support a positive and culturally appropriate | Updated to meet Standards for Training Packages | Equivalent unit |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|----------|--------------------|
| workplace culture | workplace culture | | |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM421 Support a positive and culturally appropriate workplace culture

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- support others to achieve work goals
- treat staff and colleagues with respect and sensitivity
- communicate appropriately with people from a range of diverse backgrounds
- employ strategies to encourage teamwork and reduce potential for cross-cultural misunderstandings.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain concept of community control of organisations and how it may impact day-to-day operations of the organisation
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including role in upholding traditional and cultural values and how that impacts the workplace environment
- outline relevant equity and diversity principles
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact the workplace environment and culture
- identify professional development options
- list protocols and cultural responsibilities relevant to the role of a board member
- explain respective roles and responsibilities of board members and the manager
- describe strategies for active listening
- describe strategies for giving and receiving feedback
- outline strategies for managing disagreements and cross-cultural misunderstandings
- explain teamwork theory and approaches.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- examples of issues that arise in workplaces.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM505 Control organisational finances

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to establish and maintain effective financial management within the organisation to ensure board control of finances and external accountability to statutory authorities and funding bodies.

It applies to individuals with a broad knowledge of the business or core functions of organisations, who have responsibilities for controlling an organisation's finances.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Establish a financial management structure | 1.1 Establish a structure to undertake regular financial management responsibilities on behalf of the board 1.2 Document respective responsibilities of the board and management 1.3 Determine financial information required by the board from management 1.4 Seek advice on suitable financial management systems for the |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | organisation 1.5 Identify relevant statutory requirements |
| 2 Establish financial management processes and systems | 2.1 Ensure appropriate policies and procedures are in place to open and operate necessary bank accounts 2.2 Identify approved signatories for bank accounts 2.3 Ensure authority and delegation between the board and management for management of finances are documented 2.4 Ensure statutory requirements on financial management are followed 2.5 Ensure duties of finance staff are documented 2.6 Ensure accepted procedures for receiving and expending funds are established and maintained by management 2.7 Ensure accepted systems for financial reporting are established and maintained |
| 3 Sign contracts on behalf of the organisation | 3.1 Ensure procedures for developing and documenting contracts are developed and followed 3.2 Identify people authorised to sign contracts on behalf of the organisation 3.3 Check proposed contractual arrangements are realistic for the organisation and in the organisation's and community's best interests 3.4 Ensure contracts are signed according to organisational policies and procedures |
| 4 Follow finance procedures specified by funding bodies | 4.1 Seek variations to financial agreements from relevant funding bodies if required 4.2 Identify and follow purchasing and disposal procedures specified by funding bodies 4.3 Check requirements for finance documentation specified by funding bodies are met |
| 5 Advise the community of the financial situation of the organisation | 5.1 Identify type and content of financial information that can be made publicly available 5.2 Ensure financial information is made available to members as specified in the constitution 5.3 Present financial information at meetings in a clear and simple manner |
| 6 Meet reporting | 6.1 Identify reporting requirements by relevant corporate |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| requirements of relevant corporate authorities and funding bodies | <p>authorities and funding bodies</p> <p>6.2 Establish timelines to ensure financial statements are completed within timeframe required by relevant corporate authorities and funding bodies</p> <p>6.3 Ensure auditor is appointed at annual general meeting</p> <p>6.4 Review and evaluate financial statements to ensure they meet requirements</p> <p>6.5 Check financial reports are submitted to relevant corporate authorities and funding bodies within required timeframe</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---|---|
| Reading | 1.5, 2.2, 2.4, 2.6, 2.7, 3.1, 3.3, 3.4, 4.2, 4.3, 5.1, 5.2, 6.1, 6.4, 6.5 | <ul style="list-style-type: none"> Gathers, interprets and analyses textual information from a range of sources and identifies relevant and key information |
| Writing | 1.1-1.4, 2.1, 2.3, 2.5-2.7, 3.1, 4.1, 4.2, 5.3, 6.1-6.3 | <ul style="list-style-type: none"> Develops and documents strategies ensuring vocabulary, grammatical structures and conventions are appropriate for target audience |
| Oral Communication | 1.3, 1.4, 4.1, 5.3, 6.3 | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals Uses active listening and questioning to convey and clarify information |
| Numeracy | 2.4, 4.1, 4.2, 4.3, 5.3, 6.2, 6.4 | <ul style="list-style-type: none"> Makes calculations to interpret financial reports, schedule and schedule activities Uses problem-solving strategies to manage organisational finances |
| Navigate the world of work | 1.5, 2.6, 3.4, 6.1, 6.2 | <ul style="list-style-type: none"> Keeps up-to-date with legislation or regulations relevant to own rights and responsibilities and considers implications of these when planning and undertaking work Monitors adherence to organisational policies and |

| | | |
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| | | procedures and considers own role in terms of its contribution to broader goals of work environment |
| Interact with others | 1.3, 1.4, 4.1, 5.2, 5.3, 6.3 | <ul style="list-style-type: none"> Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction |
| Get the work done | 1.1, 1.3, 2.1, 2.2, 3.2, 3.3, 4.3, 5.1, 6.2, 6.5 | <ul style="list-style-type: none"> Develops plans to manage relatively complex tasks according to a pre-determined schedule, with an awareness of how they may contribute to longer-term operational goals Considers whether and how others should be involved, often using consultative or collaborative processes as an integral part of decision-making When dealing with complex issues, may use intuition to identify the general problem, switching to analytical process to clarify goals and key issues and using lateral thinking processes to generate possible solutions |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|--|---|--------------------|
| BSBATSIM505 Control organisational finances | BSBATSIM505C Control organisational finances | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM505 Control organisational finances

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- identify role of the board and management in the control of finances
- read and interpret typical organisational financial reports
- follow policies and procedures regarding the organisation's financial management
- communicate financial information simply and clearly to others
- ensure financial reporting requirements are met.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain concept of community control of organisations and how it may impact reporting to community
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact financial reporting to the community
- explain financial responsibilities of board members and management
- outline financial support services available
- describe geographic, social, economic and political contexts in which particular organisations operate and how these may impact financial management and reporting processes
- identify organisational policies and procedures in relation to finances
- list relevant provisions of federal, state or territory legislation and funding body requirements that impact financial management and reporting
- explain purpose and meaning of components of financial reports
- describe statutory and funding body requirements in relation to finances

- outline systems and structures to effectively manage finances.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- examples of financial reports used by boards
- examples of funding agreements and other relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM506 Develop employment policies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the performance outcomes, skills and knowledge required to develop policies for the employment of staff.

It applies to individuals responsible for monitoring and guiding the employment policies of an organisation that employs staff.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Develop staff policies | 1.1 Identify employer's responsibilities with respect to staff 1.2 Develop, negotiate and endorse staffing policies with board members, management and staff, and if appropriate, unions 1.3 Ensure approved policies are communicated throughout the organisation |
| 2 Implement staff policies and procedures | 2.1 Work with other board members and management to develop and document procedures flowing from endorsed policies 2.2 Establish and implement induction processes for new staff |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>2.3 Ensure changes to policies and procedures affecting employment are communicated to staff, and if applicable, to unions</p> <p>2.4 Identify and access external industrial relations advice and representation as required</p> <p>2.5 Ensure individual contracts for employees are developed and signed within relevant enterprise agreements or awards according to policies and procedures</p> |
| 3 Monitor and review staffing policies | <p>3.1 Establish a review body for staffing policy</p> <p>3.2 Monitor and assess outside industrial influences and impacts relevant to the organisation</p> <p>3.3 Ensure regular occupational health and safety checks of workplace are undertaken according to policy and procedures</p> <p>3.4 Review grievance procedures regularly</p> <p>3.5 Ensure all aspects of employment policy and procedures are audited independently</p> <p>3.6 Evaluate results of reviews and audits, and propose changes to policy and procedures if necessary</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---------------------------------------|---|
| Reading | 1.1-1.3, 2.1, 2.2, 2.4, 2.5, 3.2-3.6 | <ul style="list-style-type: none"> Gathers, interprets and analyses textual information from a range of sources and identifies relevant and key information |
| Writing | 1.1, 1.2, 2.1-2.3, 2.5, 3.2, 3.3, 3.6 | <ul style="list-style-type: none"> Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning to relevant personnel |
| Oral Communication | 1.2, 2.2-2.4, 3.5, 3.6 | <ul style="list-style-type: none"> Uses appropriate techniques, including active listening and questioning to convey and clarify information and confirm understanding |
| Navigate the world of work | 1.2, 2.5, 3.2, 3.3, 3.6 | <ul style="list-style-type: none"> Keeps up-to-date with legislation or regulations relevant to own rights and responsibilities and considers implications of these when planning and |

| | | |
|----------------------|-------------------------|---|
| | | developing organisational policies and procedures <ul style="list-style-type: none"> • Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment • May seek to make implicit protocols and expectations more explicit and may challenge those that appear to work against effective outcomes, or do not reflect stated values |
| Interact with others | 1.2, 1.3, 2.1-2.4, 3.3, | <ul style="list-style-type: none"> • Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role • Collaborates with others to achieve joint outcomes, playing an effective role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion |
| Get the work done | 1.1, 2.2, 2.5, 3.1-3.6 | <ul style="list-style-type: none"> • Develops plans and processes to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer-term operational and strategic goals • Considers whether and how others should be involved, often using consultative or collaborative processes as an integral part of decision-making • When dealing with complex issues, may use intuition to identify the general problem, switching to analytical process to clarify goals and key issues and using lateral thinking processes to generate possible solutions |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIM506 Develop employment policies | BSBATSIM506C Develop employment policies | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM506 Develop employment policies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- effectively work with others to develop and review employment policies and procedures
- follow policies and procedures in relation to staff.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain board's responsibilities in relation to duty of care towards staff
- explain concept of community control of organisations and how it may impact employment policies
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact employment policies
- outline importance of effective communication and negotiation strategies to disseminate information and negotiate policies and procedures
- identify equity and diversity principles in relation to employment policies
- describe geographic, social, economic and political contexts in which particular organisations operate and how these may impact employment policies
- explain organisational policies and procedures in relation to staffing
- outline process for developing policies and procedures
- list relevant provisions of federal, state or territory legislation and funding body requirements that may influence employment policies, including industrial relations, occupational health and safety, and equal employment opportunity laws
- identify relevant awards and employment conditions

- outline relevant protocols and cultural responsibilities that might impact employment policies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of legislation and policy affecting the employment of staff.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM511 Develop enterprise opportunities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to identify, assess and develop business opportunities in consultation with the community to increase economic independence and expand employment.

It applies to individuals responsible for monitoring and guiding the activities of organisations investigating options to develop enterprise opportunities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Expand existing activities | 1.1 Identify existing business initiatives, employment goals and objectives 1.2 Evaluate current business activities on viability and future potential 1.3 Seek expert advice where appropriate 1.4 Support viable businesses |
| 2 Develop business ideas | 2.1 Canvass the community for business ideas and options |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|---|
| and options | 2.2 Identify and document potential skills and abilities in the community 2.3 Identify and analyse potential markets 2.4 Obtain information from business services on business development |
| 3 Evaluate business options | 3.1 Assess potentially viable businesses 3.2 Conduct feasibility studies with support of appropriately skilled personnel 3.3 Gather and document community input 3.4 Consider and document business options 3.5 In conjunction with other board members, make and document decisions on future business options 3.6 Contribute to development of business plans that take account of local cultural requirements |
| 4 Implement business proposals | 4.1 Establish structures to action business plans 4.2 Establish partnerships where appropriate 4.3 Establish monitoring and review mechanisms 4.4 Set and document achievable targets and timeframes 4.5 Establish and support boards of management of new businesses where appropriate 4.6 Provide information to the community on a regular basis |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|---|--|
| Reading | 1.1, 1.2, 2.2-2.4, 3.1, 3.2, 3.6 | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to individual, community and organisational requirements |
| Writing | 1.1, 1.2, 2.1-2.3, 3.1-3.6, 4.3, 4.4, 4.6 | <ul style="list-style-type: none"> Integrates information from a number of sources and develops content that supports the purposes and format |

| | | |
|----------------------------|---|--|
| | | of the material, using grammatical structure and clear and logical language |
| Oral Communication | 1.3, 2.1, 2.4, 3.2, 3.5, 4.2, 4.5, 4.6 | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals Uses active listening and questioning to convey and clarify information |
| Navigate the world of work | 1.1 | <ul style="list-style-type: none"> Monitors adherence to both implicit and explicit organisational policies and procedures |
| Numeracy | 1.2, 3.1, 3.2, 4.4 | <ul style="list-style-type: none"> Selects and interprets familiar mathematical information to evaluate statistical data, scheduling of work, trends and financial viability |
| Interact with others | 1.3, 2.1, 2.4, 3.2, 3.5, 4.2, 4.5, 4.6 | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders in a range of work contexts Participates in a variety of culturally appropriate spoken exchanges to work cooperatively with community members, Elders and key stakeholders, playing an active role in facilitating effective interactions |
| Get the work done | 1.1, 1.2, 1.4, 2.1-2.3, 3.1, 3.2, 3.4-3.6, 4.1, 4.3 | <ul style="list-style-type: none"> Begins to recognise the importance of other stakeholders throughout the process and is learning to clarify goals and proposed methodology with others, maintain communication and manage expectations and understanding Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account Invests time looking for new ideas and opportunities, drawing on diverse perspectives of others to gain insights into ideas for the future |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBATSIM511 Develop enterprise opportunities | BSBATSIM511C Develop enterprise opportunities | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM511 Develop enterprise opportunities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- identify potential business activities for the organisation and possible business structures to support these activities
- develop business proposals in collaboration with others
- make decisions regarding suitability of business proposals
- participate in business planning processes in collaboration with others.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe business planning strategies, including strategies for conducting feasibility studies and setting goals and objectives
- outline business processes
- identify available business support services
- explain concept of community control of organisations and how it may impact business options
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact business options and operations
- describe geographic, social, economic and political contexts in which particular organisations operate and how these may impact business options and operations
- outline information generally included in feasibility studies and how it should be interpreted
- list relevant marketing terms and strategies
- outline organisational policies and procedures in relation to business activities

- describe possible business structures
- identify relevant provisions of federal, state or territory legislation and funding body requirements that may impact business options and operations
- list relevant protocols and cultural responsibilities that might impact development of enterprise opportunities
- explain strategies for identifying skills available in the organisation and community.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- information about enterprises operated by Aboriginal and Torres Strait Islander organisations
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIM514 Recruit and induct staff

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to recruit and induct new staff and provide ongoing supervision, assessment and support of existing staff, including voluntary staff.

It applies to individuals who contribute their skills and knowledge to monitoring and guiding the activities of organisations who are involved in the recruitment and induction of voluntary or paid staff where a manager does not exist.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Plan ongoing staffing requirements | 1.1 Review staffing requirements on a regular basis 1.2 Initiate knowledge and skill audits to decide on positions required 1.3 Update recruitment policy and procedures regularly 1.4 Include additional staffing requirements in business plan 1.5 Allocate budget and resources |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| 2 Ensure staff members are recruited in line with policy and procedures | 2.1 Establish a recruitment committee 2.2 Review, endorse and document a duty statement for the position 2.3 Inform others of job vacancies 2.4 Follow the organisation's selection procedures 2.5 Notify candidates of results and provide feedback on their applications |
| 3 Induct new staff | 3.1 Develop formal contract for new employees 3.2 Outline code of conduct and how it applies 3.3 Implement induction processes |
| 4 Ensure staff have access to training and development support | 4.1 Assess and record staff development and training needs 4.2 Identify sources of funding for staff development 4.3 Ensure required staff training is provided 4.4 Encourage membership of relevant professional bodies 4.5 Promote benefits to other employers of employing local Aboriginal and Torres Strait Islander employees |
| 5 Monitor and assess staff performance regularly | 5.1 Review duty statements at regular intervals 5.2 Receive and review reports on staff performance 5.3 Follow policy and procedures to identify most appropriate person to provide effective feedback to staff on performance 5.4 Provide feedback to staff according to policy and procedures |
| 6 Oversee staff departures | 6.1 Ensure all contractual obligations and requirements are completed prior to staff departures 6.2 Adhere to appropriate policies and procedures for staff departures |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|-------|----------------------|-------------|
| | | |

| | | |
|----------------------------|--|---|
| Reading | 1.1, 1.2, 1.5, 2.2, 2.4, 3.3, 4.1-4.3, 5.1-5.3, 6.1, 6.2 | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types |
| Writing | 1.2-1.5, 2.2-2.5, 3.1, 3.3, 4.1-4.3, 4.5, 5.4, 6.1, 6.2 | <ul style="list-style-type: none"> Integrates information from a number of sources and develops content that supports purposes and format of the material, using grammatical structure and clear and logical language |
| Oral Communication | 1.2, 2.1, 2.3-2.5, 3.2, 3.3, 4.5, 5.2-5.4 | <ul style="list-style-type: none"> Effectively participates in verbal exchanges using active listening and questioning to convey and clarify information |
| Numeracy | 1.5, 3.1, 4.2 | <ul style="list-style-type: none"> Selects and interprets mathematical information that is partly embedded in a range of familiar and some less familiar tasks and texts |
| Navigate the world of work | 1.3, 2.4, 5.3, 5.4, 6.1, 6.2 | <ul style="list-style-type: none"> Takes personal responsibility for adherence to legal and procedural requirements and considers own role in terms of its contribution to broader goals of work environment Develops and reviews organisational policies and procedures in accordance with legal and organisational requirements |
| Interact with others | 1.1, 2.3, 2.5, 3.2, 4.4, 4.5, 5.4 | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with candidates or staff members in a range of work contexts |
| Get the work done | 1.1, 1.2, 1.4, 2.1, 3.3, 4.1-4.3 | <ul style="list-style-type: none"> Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer-term operational and strategic goals Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account When dealing with complex issues, may use intuition to identify the general problem, switching to analytical process to clarify goals and key issues and using lateral thinking processes to generate possible solutions |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|----------------------------------|--------------------|
| BSBATSIM514 Recruit and induct | BSBATSIM514A Recruit and induct | Updated to meet Standards for | Equivalent unit |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|-------------------|--------------------|
| staff | staff | Training Packages | |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIM514 Recruit and induct staff

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- select and induct staff according to organisational policies and procedures
- monitor staff performance and provide feedback according to policies and procedures
- identify appropriate professional development activities for staff
- ensure policies and procedures relating to staff departures are followed.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain concept of community control of organisations and how it may impact staff recruitment and induction processes
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact recruitment and induction processes
- outline relevant equity and diversity principles on staffing
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact recruitment and induction processes
- list relevant organisational policies, procedures and codes of conduct on staff recruitment and induction, including recruitment and induction procedures
- identify relevant provisions of federal, state or territory legislation and funding body requirements that may impact recruitment and induction processes
- outline relevant protocols and cultural responsibilities that impact recruitment and induction processes
- describe training options suitable to staff and board members.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- examples of relevant policies and procedures
- access to examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIW416 Obtain and manage consultancy services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to obtain and manage consultancy services.

It applies to individuals who are responsible for obtaining and managing external experts to assist in the activities of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Establish need for external advice | 1.1 Identify required expertise not available within the organisation 1.2 Identify potential funding sources to purchase outside expertise |
| 2 Prepare terms of reference | 2.1 Form a management group to oversee the project 2.2 Prepare terms of reference (consultancy brief) for consultant services 2.3 Identify and include opportunities for paid community involvement where appropriate |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|--|
| 3 Select consultant | 3.1 Advertise terms of reference for consultancy 3.2 Establish a process for short-listing, including appointment of selection panel 3.3 Select most suitable applicant according to the organisation's requirements, policies and procedures 3.4 Ensure successful and unsuccessful applicants are advised of outcome and provided with feedback 3.5 Ensure appropriate procedures are in place to document selection process and outcome |
| 4 Develop contract | 4.1 Obtain legal advice on contract requirements 4.2 Ensure a draft contract is prepared in accordance with legal advice outlining what is required of the consultant |
| 5 Brief consultant | 5.1 Clarify the board's requirements with consultant 5.2 Negotiate final details of project with consultant, including expectations of performance and outcomes 5.3 Ensure contract is finalised and signed 5.4 Familiarise consultant with the organisation and its personnel |
| 6 Monitor consultant's performance | 6.1 Check reports are received from consultant according to contractual requirements 6.2 Evaluate reports against agreed outcomes and follow up issues where required 6.3 Participate in performance reviews against contract requirements 6.4 Ensure progress payments are made against milestones and key performance indicators 6.5 Ensure final payment is made when contract requirements have been met |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|-------|----------------------|-------------|
| | | |

| | | |
|----------------------------|---|--|
| Reading | 1.1, 1.2, 2.2, 2.3, 4.1, 4.2, 5.3, 6.1-6.4 | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types |
| Writing | 2.2, 2.3, 3.1-3.5, 4.2, 5.3, 6.2 | <ul style="list-style-type: none"> Integrates information from a number of sources and develops content that support purposes and format of the material, using clear and logical grammatical structure and appropriate language |
| Oral Communication | 2.1, 3.4, 4.1, 5.1, 5.2, 5.4, 6.2, 6.3 | <ul style="list-style-type: none"> Uses active questioning and listening to elicit information and confirm understanding Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate relevant information to a variety of individuals |
| Numeracy | 1.2, 6.4, 6.5 | <ul style="list-style-type: none"> Interprets numerical information and makes basic calculations to manage resources and consultant's fees |
| Navigate the world of work | 3.3, 4.1, 4.2, 6.1 | <ul style="list-style-type: none"> Monitors adherence to legal requirements and organisational procedures and considers own role in terms of its contribution to broader goals of work environment |
| Interact with others | 2.1, 3.2, 3.4, 4.1, 5.1, 5.2, 5.4, 6.2, 6.3 | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to share information or negotiate shared outcomes Cooperates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability |
| Get the work done | 1.1, 1.2, 2.1, 2.3, 3.2, 3.3, 3.5, 6.2 | <ul style="list-style-type: none"> Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer-term operational and strategic goals Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information and identifying options to make decisions Recognises and addresses some unfamiliar problems of increasing complexity within own scope, recognising when to seek expertise of others |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|----------------------------------|--------------------|
| BSBATSIW416 Obtain and manage | BSBATSIW416C Obtain and manage | Updated to meet Standards for | Equivalent unit |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|-------------------|--------------------|
| consultancy services | consultancy services | Training Packages | |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIW416 Obtain and manage consultancy services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- obtain appropriate consultancy services that meet legal and organisational requirements
- monitor and review consultant's performance against relevant criteria
- provide feedback on consultant's performance.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain concept of community control of organisations and how it may impact the selection of a consultant
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how this might impact the selection of a consultant
- outline development and typical content of terms of reference, milestones and performance indicators
- explain equity and diversity principles as they apply to consultant selection
- identify external skill or competency needs required by the organisation
- describe various forms of contract and contractual obligations for consultants
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact the selection of a consultant
- explain recruitment and selection process in relation to obtaining consultancy services
- outline relevant protocols and cultural responsibilities when engaging a consultant
- identify sources of legal advice available and how they can be accessed.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of situations where boards may seek consultancy services
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIW417 Select and use technology

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to assess, use and evaluate new technologies for the benefit of the organisation.

It applies to individuals responsible for monitoring and guiding the activities of an organisation anticipating the introduction of new technologies to the workplace.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Assess technology needs | 1.1 Identify organisational tasks that could be helped by technology 1.2 Undertake a cost-benefit analysis 1.3 Seek independent technical advice as necessary |
| 2 Acquire technology | 2.1 Investigate costs of acquiring technology 2.2 Investigate ways of acquiring or accessing technology other than by funding 2.3 Investigate sources of funding for technology purchases and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>associated costs</p> <p>2.4 Seek funds required for purchase of technology and associated costs</p> |
| 3 Ensure staff are prepared for new technology | <p>3.1 Evaluate need for technology training</p> <p>3.2 Identify suitable trainers and/or mentors to support staff to use the new technology</p> <p>3.3 Ensure suitable training is provided for staff who will use new technology</p> |
| 4 Evaluate use of technology | <p>4.1 Develop strategies to ensure new technology is used within the organisation</p> <p>4.2 Evaluate whether technology is used effectively and meets organisational needs</p> <p>4.3 Identify barriers to effective use of the technology</p> <p>4.4 Develop and implement actions to address barriers to its effective use</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|----------------------------|---|
| Reading | 1.2, 2.1-2.3, 3.1, 4.2 | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to organisational requirements |
| Writing | 1.2, 2.1-2.3, 2.4, 4.1-4.4 | <ul style="list-style-type: none"> Integrates information from a number of sources and develops content that supports purposes and format of the material using appropriate grammatical structure and clear, logical language |
| Oral Communication | 1.3, 2.1-2.4, 3.2, 3.3 | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals Uses active listening and questioning to convey and clarify information |
| Numeracy | 1.2, 2.1, 2.3, 2.4 | <ul style="list-style-type: none"> Interprets numerical information and makes calculations to determine cost-benefits and manage |

| | | |
|----------------------|---------------------------------|--|
| | | resource allocations |
| Interact with others | 1.3, 2.4, 3.2, 3.3 | <ul style="list-style-type: none"> Cooperates with others as part of familiar routine activities Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Get the work done | 1.1, 2.1-2.3, 3.1, 3.2, 4.1-4.4 | <ul style="list-style-type: none"> Actively identifies systems, devices and applications with potential to meet current and or future needs Uses a combination of formal, logical planning processes and an increasingly intuitive understanding of context to identify relevant information and evaluate alternative strategies and resources Uses analytical processes to decide on a course of action, establishing criteria for deciding between options and seeking input and advice from others before taking action when necessary |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBATSIW417 Select and use technology | BSBATSIW417C Select and use technology | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIW417 Select and use technology

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- choose appropriate technology to support the organisation's activities
- identify suitable training options to support introduction of new technology
- develop strategies to ensure technology is used effectively within the organisation.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain basic principles of cost-benefit analysis
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, and how that may impact selection and use of technology
- identify equipment and funding sources
- describe geographic, social, economic and political contexts in which particular organisations operate and how these may impact selection and use of technology
- list potential barriers to learning, and strategies to address these
- list relevant provisions of federal, state or territory legislation and funding body requirements that may impact purchase, use and disposal of assets
- describe range of technology options available to support organisational activities
- outline relevant protocols and cultural responsibilities when supporting members of staff
- identify strategies to evaluate the use of information technology
- describe training options available to the organisation to develop skills in use of technology.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of technology used in workplaces.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIW514 Represent your organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required for board members to represent their organisation in a range of situations, including in the community, government and private sector and through establishing relevant networks.

It applies to individuals who contribute their skills and knowledge to monitoring and guiding the activities of the organisation and who are responsible for representing their organisation in a range of forums.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Obtain authorisation and act ethically | 1.1 Obtain permission to represent the organisation 1.2 Undertake activities within limits of the board role 1.3 Follow a code of conduct |
| 2 Become informed about organisational policies, current operations and | 2.1 Describe and explain the organisation's current policies and operations 2.2 Obtain information about external politics that might affect the |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| relevant local politics | organisation |
| 3 Develop and participate in networks | 3.1 Identify and establish links with individuals, groups and organisations relevant to work of the organisation 3.2 Participate in networks relevant to the organisation |
| 4 Receive and provide information relating to the work of the organisation | 4.1 Provide information to stakeholders about board decisions, developments and activities of the organisation 4.2 Gather information about relevant activities in the community and wider community 4.3 Follow protocols with respect to the community and wider community |
| 5 Promote the work of the organisation | 5.1 Inform the community, other organisations, government and businesses about the work and achievements of the organisation 5.2 Seek support for the organisation's work from appropriate people and organisations 5.3 Present information that helps the organisation achieve its objectives |
| 6 Be accountable to the board | 6.1 Ensure appropriate confidentiality of the organisation's information 6.2 Provide information and feedback to the board |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|---|--|
| Reading | 1.3, 2.2, 4.2 | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to individual, community and organisational requirements |
| Writing | 4.1, 5.1, 5.3, 6.2 | <ul style="list-style-type: none"> Integrates information from a number of sources and develops written material using appropriate grammatical structure and clear language |
| Oral | 1.1, 1.2, 2.1, 2.2, 3.1, 3.2, 4.1, 4.2, | <ul style="list-style-type: none"> Participates in culturally appropriate and respectful verbal exchanges with community members and key |

| | | |
|----------------------------|---|--|
| Communication | 5.1-5.3, 6.2 | stakeholders using clear language, suitable syntax and tone to address and disseminate relevant information <ul style="list-style-type: none"> • Uses active questioning and listening to elicit information and confirm understanding |
| Navigate the world of work | 2.1, 4.3 | <ul style="list-style-type: none"> • Monitors adherence to organisational policies and procedures • Understands limits of own role and how own work meshes with others and contributes to broader work goals |
| Interact with others | 1.1, 2.1, 2.2, 3.1, 3.2, 4.1, 4.2, 5.1-5.3, 6.2 | <ul style="list-style-type: none"> • Actively identifies requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction • Recognises importance of building rapport to establish effective working relationships |
| Get the work done | 2.2, 4.2, 6.1 | <ul style="list-style-type: none"> • Uses a combination of formal and logical planning processes and an increasingly intuitive understanding of context to identify relevant information • Makes a range of decisions in relatively complex situations, taking a range of constraints into account • Understands importance of secure and confidential organisational information and takes personal responsibility for identifying and managing risk factors |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBATSIW514 Represent your organisation | BSBATSIW514C Represent your organisation | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIW514 Represent your organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- follow relevant protocols and codes of conduct when representing the organisation
- provide information about the organisation to others that promotes the work of the organisation
- collaborate effectively with relevant individuals and networks
- maintain information securely
- provide objective feedback to the board.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline business ethics, including codes of conduct
- explain concept of community control of organisations and how it may impact the way the organisation is represented
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact the way the organisation is represented
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact the way the organisation is represented
- list organisational policies and processes in relation to representing the organisation
- explain the personal role and responsibilities of a board member
- summarise presentation techniques to provide information on the organisation
- identify relevant networks and media outlets
- name relevant protocols and cultural responsibilities that impact how the organisation is represented

- outline strategies for advocating on behalf of the organisation and its members
- describe techniques used to effectively represent the organisation in interviews.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBATSIW515 Secure funding

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to locate funding sources, make submissions and lobby to maximise the organisation's chances of securing funds for its activities.

It applies to individuals responsible for monitoring and guiding the activities of the organisation and securing funding for it to be able to undertake these activities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Identify and contact funding bodies | 1.1 Identify and investigate mainstream and Aboriginal and Torres Strait Islander funding sources 1.2 Gather information about potential funding bodies' priorities, key areas and expected outcomes 1.3 Clearly explain organisational funding requirements to potential funding bodies |
| 2 Prepare case for | 2.1 Form team to oversee funding submission |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------|--|
| funding | 2.2 Delegate tasks to staff if appropriate 2.3 Determine if consultant services should be engaged to provide technical assistance preparing case for funding 2.4 Ensure a proposal is prepared that meets funding body's objectives, criteria and submission requirements 2.5 Ensure all existing financial obligations with respect to the funding body are up-to-date |
| 3 Promote case for funding | 3.1 Use networks to lobby funding body where appropriate 3.2 Seek representation with funding body if necessary 3.3 Advise key people of progress and outcome of submission |
| 4 Appeal if necessary | 4.1 Identify relevant appeal authorities and procedures for funding bodies 4.2 Determine whether an appeal should be made if funding submission is unsuccessful 4.3 Use the appeal system if required |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|-------------------------|---|
| Reading | 1.1, 1.2, 2.4, 2.5, 4.1 | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to individual and organisational requirements |
| Writing | 1.1-1.3, 2.4, 2.5, 3.3 | <ul style="list-style-type: none"> Integrates information from a number of sources and develops content that support purposes and format of the material using grammatical structure and clear and logical language |
| Oral Communication | 1.3, 2.1, 2.2, 3.1-3.3 | <ul style="list-style-type: none"> Participates in a variety of culturally appropriate spoken exchanges to work cooperatively with staff and key stakeholders Applies relevant listening skills to ensure views of all relevant stakeholders are heard and treated with respect |

| | | |
|----------------------------|-----------------------------|--|
| Numeracy | 1.1-1.3, 2.4, 2.5 | <ul style="list-style-type: none"> Selects and interprets familiar mathematical information to evaluate statistical data, financial obligations and funding requirements |
| Navigate the world of work | 2.4, 2.5 | <ul style="list-style-type: none"> Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of wider environment |
| Interact with others | 1.3, 2.1, 2.2, 3.1-3.3, 4.3 | <ul style="list-style-type: none"> Actively identifies requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience Recognises importance of building rapport with people from diverse backgrounds to establish effective teams and other working relationships Looks for the strengths in others and finds ways to work with and build on these, sharing own knowledge and experience freely |
| Get the work done | 1.1, 1.2, 2.2, 2.3, 4.1-4.3 | <ul style="list-style-type: none"> Organises time and effort around priorities, results and realistic timeframes Begins to recognise importance of other stakeholders throughout the planning process and is learning to clarify goals and methodology with others, maintain communication and manage expectations and understanding Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information and identifying and evaluating options against agreed criteria Uses ideas proposed by others as provocations and stepping stones to new perceptions and ideas |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|---|--------------------|
| BSBATSIW515 Secure funding | BSBATSIW515C Secure funding | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBATSIW515 Secure funding

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- identify funding sources
- complete funding applications
- confirm submission meets funding body's requirements
- maintain open lines of communication with relevant individuals and network to promote application for funding
- follow appeal procedures if required.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline appeal procedures available if funding submission is rejected
- explain concept of community control of organisations and how it may impact the way funding is sourced and used
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that may impact the way funding is sourced and used
- list funding sources and their requirements
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact the way funding is sourced and used
- identify organisational policies and procedures in relation to obtaining funding
- describe relevant consultancy services to support funding submissions
- list relevant protocols and cultural responsibilities that impact how funding is sourced.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- examples of projects requiring funding
- the internet or other sources of information about funding bodies
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD411 Participate in quality audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prepare for and participate in quality audits as a member of a quality audit team. The types of audits may include internal or external systems audits, process audits or product/service audits. The process includes reviewing designated documentation; identifying and developing checklists and audit related documentation; preparing audit plans and evaluating information; and reporting findings to the lead auditor.

The unit applies to individuals with a broad knowledge of the quality auditing environment, who gather, analyse and evaluate information from a variety of sources and provide objective audit findings, to be included as part of the audit report.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review own role and documentation | 1.1 Review own role and responsibilities within quality audit team 1.2 Review previous quality audits and determine impact on conduct of current audit, where required 1.3 Source required organisational documentation from lead auditor, and check the adequacy of the documentation 1.4 Review documents, and determine and request further documentation required |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 1.5 Identify and resolve documentation issues with lead auditor and relevant stakeholders, within scope of own role 1.6 Identify aspects of the audit that require the use of specialists and refer to lead auditor |
| 2. Participate in audit preparation | 2.1 Access or prepare checklists, tools and audit related documentation 2.2 Confirm schedule and required resources with lead auditor 2.3 Prepare for possible issues and outline mitigation strategies 2.4 Confirm that preparation activities and documentation align with the audit plan with required personnel 2.5 Determine appropriate methods and techniques in consultation with auditing team 2.6 Create entry and exit meeting agendas according to organisational templates, and present to required audit team member, where required 2.7 Participate in entry meeting |
| 3. Gather and analyse information | 3.1 Access a range of sources of information relevant to task 3.2 Collect, and make an initial assessment of, documentation 3.3 Communicate with relevant parties in relation to documentation 3.4 Analyse patterns, trends, interrelationships and areas of risk, and communicate to team according to own role and responsibilities |
| 4. Evaluate information | 4.1 Evaluate information against prescribed benchmarks 4.2 Form an objective decision regarding the level of compliance found 4.3 Check decision is formed from and supported by available information |
| 5. Report findings | 5.1 Formulate findings and prepare recommendations on corrective actions if discrepancies or non-compliances are detected 5.2 Examine results and findings against audit objectives and present to lead auditor 5.3 Report recommendations for improvements to lead auditor according to agreed documentation |
| 6. Participate in exit meeting process | 6.1 Prepare for exit meeting using exit meeting agenda 6.2 Confirm context and consequences of audit are explained, and follow-up is discussed |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Identifies and interprets information from organisational documentation and workplace procedures |
| Writing | <ul style="list-style-type: none">Records or amends information and conveys detailsProduces reports matching style of writing to purpose and audience |
| Oral Communication | <ul style="list-style-type: none">Participates in spoken exchanges using structure and language to suit the audienceListens for required information and asks clarifying questions |
| Teamwork | <ul style="list-style-type: none">Collaborates and cooperates with others to achieve joint outcomesSelects and uses appropriate conventions and protocols when communicating with team members and other people in a range of work contexts |
| Self-management | <ul style="list-style-type: none">Organises, plans and prioritises workload with some sense of what can be achieved in a timeframe |
| Problem solving | <ul style="list-style-type: none">Recognises and addresses some problems within own scope, recognising when to seek the expertise of others |
| Technology | <ul style="list-style-type: none">Uses digital tools and systems to report audit findings |

Unit Mapping Information

Supersedes and is equivalent to BSBAUD402 Participate in a quality audit.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD411 Participate in quality audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- participate in a quality audit as a member of a quality audit team on at least two occasions.

In the course of the above, the candidate must:

- source and review documentation
- develop audit plan using tools and strategies
- use predetermined reference criteria to evaluate findings and formulate well-founded objective decisions
- contribute to preparation of a corrective action report
- use terminology relating to auditing in written and oral communications.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- auditing benchmarks
- auditing methods and techniques
- current audit practices
- current industry products and services that support the auditing process
- key components of an audit plan
- patterns, trends, interrelationships and areas of risk in an organisational quality system
- key features of technology required for quality auditing participation and reporting.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation including previous quality audit reports, checklists, risk management plans and audit plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD412 Work within compliance frameworks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify statutory, legislative and regulatory requirements and relate them to individual work practices to ensure ongoing adherence to the compliance framework.

The unit applies to individuals who carry out work in accordance with the compliance framework applying to a particular job role, occupation or profession.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify compliance requirements | 1.1 Identify and document statutory, legislative and regulatory requirements relevant to job role and industry 1.2 Identify and document organisational and industry requirements |
| 2. Interpret compliance requirements | 2.1 Map compliance requirements against position description and work practices 2.2 Discuss ethical considerations with relevant stakeholders |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|--|
| 3. Manage personal compliance | 3.1 Consult with relevant stakeholders and identify procedures to be applied, applicable to work environment and own job role 3.2 Evaluate own actions in the context of compliance requirements 3.3 Record own compliance action according to organisational policies and procedures |
| 4. Review own compliance | 4.1 Seek feedback on personal compliance from relevant personnel 4.2 Access and analyse documentation relating to changes in compliance requirements 4.3 Discuss feedback and documentation with relevant personnel and check own ongoing compliance 4.4 Identify required changes to own compliance practice |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and analyses statutory, legislative and regulatory requirements to determine key information, specific requirements and responsibilities |
| Writing | <ul style="list-style-type: none"> Collates and compiles information gathered from multiple sources in required format for using technical and enterprise specific language |
| Oral Communication | <ul style="list-style-type: none"> Discusses compliance using structure and language to suit the audience Uses listening and questioning techniques to confirm understanding of compliance requirements |
| Self-management | <ul style="list-style-type: none"> Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements |

Unit Mapping Information

Supersedes and is equivalent to BSBCOM406 Conduct work within a compliance framework.

Supersedes but is not equivalent to:

- BSBCOM401 Organise and monitor the operation of compliance management system
- BSBCOM402 Implement processes for the management of a breach in compliance requirements

- BSBCOM403 Provide education and training on compliance requirements and systems
- BSBCOM404 Promote and liaise on compliance requirements, systems and related issues
- BSBCOM405 Promote compliance with legislation
- BSBEDU301 Assist with monitoring compliance in international education services.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD412 Work within compliance frameworks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions, interpret and apply personal compliance requirements for job role and industry.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, regulations and codes of conduct relevant to job role, occupation and profession
- sources of information to ensure currency with changes in compliance requirements
- organisational policies and procedures relevant to compliance framework in relevant industry
- individual work requirements and practices
- methods to map compliance requirements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations and codes of conduct relevant to job role, occupation and profession
- position descriptions
- organisation policies and procedures relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD511 Initiate quality audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to initiate and organise quality audits. It covers assessing the scope and objectives of quality audits; communicating with the auditees and developing and submitting a quality audit plans.

The unit applies to individuals who have an established knowledge base in quality auditing, and who are proficient in using a range of quality auditing and managerial techniques to initiate quality audits. Individuals may also supervise and monitor the processes and outcomes of others working in a quality audit team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assess quality audit scope and objectives | 1.1 Identify standards that impact on the environment in which audit operates 1.2 Determine and agree on audit objectives and scope with auditee and other required stakeholders 1.3 Identify risks within scope of quality audit |
| 2. Communicate with auditee | 2.1 Consult with auditee and determine relevant information 2.2 Prepare audit notifications according to organisational protocols 2.3 Confirm proposed audit methods and techniques to be applied |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | with auditee 2.4 Outline audit processes and establish sequence of audit activities, and the role of the audit team and auditee |
| 3. Prepare resources for quality audit | 3.1 Identify resources required to perform the quality audit 3.2 Select audit team members on the basis of relevant expertise 3.3 Identify resources required with auditee |
| 4. Develop and submit quality audit plan | 4.1 Develop quality audit plan according to established scope and objectives 4.2 Assign roles and responsibilities to audit team members 4.3 Assign timing, schedules and responsibilities for implementation of the audit plan 4.4 Document and submit audit plan to auditee for approval, where required |
| 5. Prepare audit team | 5.1 Inform audit team members of their responsibilities, audit objectives and scope 5.2 Communicate audit plan and schedules to all audit team members 5.3 Discuss and clarify audit methods and techniques with audit team members |
| 6. Review auditee documentation | 6.1 Determine auditee's previous quality audits as relevant and establish impact on the conduct of the current audit 6.2 Source organisational documentation from auditee, and check adequacy of documentation provided 6.3 Review documents, and determine and source any further documentation required |
| 7. Prepare audit documentation | 7.1 Develop checklist according to audit scope and objectives 7.2 Create entry and exit meeting agendas according to organisational templates |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses information from organisational documentation |
| Writing | <ul style="list-style-type: none"> Develops a range of documents using structure, tone and vocabulary |

| Skill | Description |
|-------------------------|--|
| | <ul style="list-style-type: none">appropriate to audience, context and purposeRecords and amends information and conveys details in accordance with audit objectives |
| Oral Communication | <ul style="list-style-type: none">Participates in spoken exchanges using structure and language to suit the audienceUses questioning and listening techniques to clarify requirements |
| Numeracy | <ul style="list-style-type: none">Uses mathematical calculations for project scheduling |
| Planning and organising | <ul style="list-style-type: none">Monitors adherence to organisational policies and relevant standards |
| Teamwork | <ul style="list-style-type: none">Collaborates with others to negotiate acceptable outcomes, playing an active role in facilitating effective group interaction |
| Problem solving | <ul style="list-style-type: none">Identifies and addresses complex problems within own scope, recognising when to seek the expertise of others |
| Self-management | <ul style="list-style-type: none">Organises, plans and sequences own workload and schedules work activities of others |
| Technology | <ul style="list-style-type: none">Uses digital tools and systems to assist in initiating quality audits |

Unit Mapping Information

Supersedes and is equivalent to BSBAUD501 Initiate a quality audit.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD511 Initiate quality audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- produce documented audit plans for auditees on at least two different occasions, including:
 - scope and objectives of the audit
 - proposed audit methods and techniques to be used
 - required resources and audit plan
 - allocation of individual audit team member responsibilities.

In the course of the above, the candidate must:

- use terminology relating to quality auditing in communications.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- auditing codes of practice and ethics
- auditing methods and techniques, including audit plans and value adding activities
- requirements of auditing regulations and standards
- current audit practices
- quality auditing principles, techniques and systems
- requirements of organisational and audit style manual protocols for written communications
- key features of technology required for quality auditing activities described in performance evidence.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation including previous quality audit reports, checklists, risk management plans and audit plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD512 Lead quality audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead audit teams as they conduct quality audits. It covers conducting entry and exit meetings; identifying and gathering relevant information; managing audit team resources; and providing feedback to audit team members on their performance.

The unit applies to individuals who have a well-established knowledge of quality auditing and who are proficient in using a range of quality auditing and managerial techniques to supervise quality audit teams.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Lead entry meeting | 1.1 Confirm agenda is prepared for entry meeting 1.2 Review and confirm proposed audit plan with relevant stakeholders in entry meeting 1.3 Make changes to audit plan, as required |
| 2. Identify and gather evidence | 2.1 Identify sources of information according to audit plan 2.2 Interview relevant stakeholders 2.3 Gather information and documentation |
| 3. Manage audit team | 3.1 Supervise activities of audit team members |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| resources | 3.2 Re-assign team members, as required 3.3 Instigate contingency actions, as required |
| 4. Lead exit meeting | 4.1 Review, assess, and reach agreement on audit team findings according to audit plan 4.2 Prepare for exit meeting 4.3 Examine results and findings against audit objectives and present to relevant stakeholders 4.4 Confirm reporting arrangements for the quality audit with the auditee 4.5 Explain context and consequences of audit and discuss follow-up 4.6 Review and submit final audit report according to audit plan |
| 5. Lead team members in performance improvement | 5.1 Provide feedback on performance to audit team 5.2 Encourage and support audit team to review their own work 5.3 Provide and document advice for individual improvement |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and analyses information from audit scoping materials |
| Writing | <ul style="list-style-type: none"> Develops a range of documents using relevant structure, tone and vocabulary appropriate to audience, context and purpose Records and amends information and conveys details in accordance with audit objectives |
| Oral Communication | <ul style="list-style-type: none"> Participates in spoken exchanges using clear language, tone and pace Uses questioning and listening techniques to clarify requirements |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical calculations to analyse and arrange numeric information |
| Teamwork | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to team communication requirements Recognises the importance of rapport in establishing and building effective working relationships Collaborates with others to negotiate acceptable outcomes, playing an active role in directing and facilitating effective group interaction |
| Initiative and | <ul style="list-style-type: none"> Makes a range of critical and non-critical decisions in relatively |

| Skill | Description |
|-----------------|---|
| enterprise | complex situations, taking a range of factors into account |
| Self-management | <ul style="list-style-type: none">Organises, plans and sequences own workload and schedules work activities of others |
| Problem solving | <ul style="list-style-type: none">Responds to problems requiring immediate attention, drawing on past experiences to devise solutions |
| Technology | <ul style="list-style-type: none">Uses digital tools and systems to assist in leading a quality audit team |

Unit Mapping Information

Supersedes and is equivalent to BSBAUD503 Lead a quality audit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD512 Lead quality audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead a quality audit team on at least two occasions, including:
 - leading entry and exit meetings
 - identifying all objectives, schedules and relevant information and confirming they have been included in the audit plan
 - managing the information gathering process by team members, and analysing, synthesising and reporting of the findings
 - assisting team members to continuously improve their performance.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- quality auditing principles, methods and techniques
- requirements of auditing standards
- key features of technology required for quality auditing activities for leading a quality audit team
- strategies to develop performance improvement in audit team members.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation including previous quality audit reports
- checklists
- risk management and audit plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD513 Report on quality audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to report on the outcomes of quality audits and take appropriate follow up actions. It covers compiling audit results, preparing reports for relevant stakeholders, and negotiating follow up actions with relevant stakeholders.

The unit applies to individuals who have an established knowledge of quality auditing and are proficient in using a range of quality auditing techniques. It addresses the function performed by either an auditor having sole responsibility for the audit or an auditor required to report on quality audits as part of a quality audit team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to report audit results | 1.1 Compile audit results 1.2 Analyse compiled audit results against agreed audit plan and identify non-compliances 1.3 Consult with team members, if required |
| 2. Prepare final audit report | 2.1 Produce draft audit report according to audit plan 2.2 Provide draft report to relevant stakeholders and seek feedback 2.3 Finalise audit report, integrating stakeholder feedback, as required 2.4 Present final audit report to auditee and other relevant |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | stakeholders |
| 3. Agree on follow up process with auditee | 3.1 Determine timeframes for any corrective action required to deal with non-conformance, in consultation relevant stakeholders, including the auditee 3.2 Confirm corrective action follow-up procedures are agreed with relevant stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses information from a complex range of organisational documentation |
| Writing | <ul style="list-style-type: none"> Develops a variety of complex documents using relevant structure, tone and vocabulary appropriate to audience, context and purpose |
| Oral Communication | <ul style="list-style-type: none"> Participates in spoken exchanges using clear language, tone and pace Uses questioning and listening techniques to clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Collects, represents, summarises and interprets a range of statistical data |
| Self-management | <ul style="list-style-type: none"> Monitors adherence to organisational policy/ies and procedure/s Organises, plans and sequences own workload according to timelines and organisational requirements Analyses outcomes of decisions to identify opportunities for improvement |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to negotiate joint outcomes, playing an active role in facilitating team understanding |
| Problem solving | <ul style="list-style-type: none"> Recognises a range of familiar problems, their symptoms and causes, actively looking for suitable corrective actions |
| Initiative and enterprise | <ul style="list-style-type: none"> Makes a range of decisions in complex situations, taking a range of factors into account |
| Technology | <ul style="list-style-type: none"> Uses digital tools and systems to develop reports in an effective way |

Unit Mapping Information

Supersedes and is equivalent to BSBAUD504 Report on a quality audit.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD513 Report on quality audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- interpret audit results and produce a detailed audit report containing detailed analysis according to specified organisational requirements on at least two different occasions.

In the course of the above, the candidate must:

- negotiate follow-up actions with relevant stakeholders
- use terminology relating to quality auditing.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- quality auditing principles, methods and techniques
- requirements of auditing regulations
- key features of technology required for producing quality auditing results and reports according to organisational requirements
- presentation of corrective action requirements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation including quality audit reports, checklists, and audit plans
- technology required for quality auditing reporting.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD514 Interpret compliance requirements

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify and interpret the range of internal and external compliance requirements and obligations that must be fulfilled by an organisation or work area.

The unit applies to individuals who use their knowledge of compliance and skills in identifying compliance requirements to plan, carry out and evaluate their own work and/or the work of a team.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Clarify the scope of operations | 1.1 Analyse organisational operations and identify the functions, products and services that may be subject to compliance requirements 1.2 Develop and document plan for determining relevant compliance requirements 1.3 Obtain approval of plans from relevant stakeholders |
| 2. Identify compliance requirements | 2.1 Research information on compliance requirements relevant to the organisation 2.2 Analyse and document information from search according to organisational requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.3 Organise and store collected information on relevant compliance requirements according to organisation policies and procedures |
| 3. Interpret and prioritise compliance requirements | 3.1 Discuss and clarify with relevant stakeholders ambiguities and issues experienced in interpreting identified compliance information 3.2 Prioritise compliance requirements according to organisational requirements |
| 4. Document compliance requirements | 4.1 Organise and document outcomes of the identification and interpretation activities 4.2 Prepare and distribute reports of compliance requirements and assessment of implications to relevant stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Identifies, interprets, analyses and reviews complex texts from various sources to determine compliance requirements |
| Writing | <ul style="list-style-type: none">Collates and compiles results of research and analysis using technical language and organisational formatsDevelops materials to convey information, requirements and recommendations using language and structure appropriate to the audience |
| Oral Communication | <ul style="list-style-type: none">Uses appropriate techniques, including active listening and questioning, to seek approvals and to confirm understanding |
| Self-management | <ul style="list-style-type: none">Takes responsibility for following policies, procedures and legislative requirements |
| Technology | <ul style="list-style-type: none">Uses digital tools and systems to locate, organise and share information in effective ways |

Unit Mapping Information

Supersedes and is equivalent to BSBCOM501 Identify and interpret compliance requirements.

Supersedes but is not equivalent to BSBCOM601 Research compliance requirements and issues.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD514 Interpret compliance requirements

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- analyse operations of an organisation or work area, identify areas subject to compliance requirements and report findings, on at least three occasions.

In the course of the above, the candidate must:

- interpret and analyse information from standards, legislation, regulations, industry and organisational codes of practice and determine their relevance to compliance in the organisation
- document and store the outcomes of identification and interpretation activities related to the organisation's compliance requirements
- report on adherence to key compliance requirements and the implications of these for the organisation or work area.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- standards, legislation, and codes relevant to compliance requirements
- key sources of information relevant to organisational compliance requirements
- compliance requirements relevant to the operations of organisation or work area.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- standards, legislation, codes relevant to compliance requirements

- resources for conducting digital searches.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD515 Evaluate and review compliance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to evaluate an organisation's management system and assess its ability to fulfil its obligations and responsibilities under applicable compliance requirements.

The unit applies to individuals who are responsible for evaluating and reviewing the operation and effectiveness of an organisation's management system to ensure compliance with the relevant standards.

Application of this unit must be consistent with the relevant sections of standards and legislative requirements.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop evaluation plan | 1.1 Obtain and interpret information on organisation's policies, procedures and compliance requirements 1.2 Develop evaluation methodology 1.3 Prepare evaluation plan, detailing established evaluation criteria and data to be collected 1.4 Confirm approval of plan from relevant stakeholders |
| 2. Prepare evaluation data | 2.1 Source required evaluation data according to evaluation plan 2.2 Organise, interpret and review collected data against established evaluation criteria 2.3 Discuss issues interpreting data and address in consultation with |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | relevant stakeholders 2.4 Arrange evaluation data for analysis |
| 3. Analyse data | 3.1 Analyse evaluation data in accordance with evaluation plan 3.2 Discuss outcomes and findings of the analysis with relevant stakeholders |
| 4. Determine evaluation findings and outcomes | 4.1 Develop and discuss preliminary findings and any identified issues with relevant stakeholders 4.2 Source additional data required to clarify aspects of findings, and issues, where required 4.3 Prepare recommendations for actions to improve identified issues |
| 5. Distribute outcomes and recommendations of evaluation | 5.1 Prepare draft report of outcomes, findings and recommendations of the compliance evaluation 5.2 Distribute draft report to relevant stakeholders 5.3 Edit report based on the feedback obtained 5.4 Proofread report in preparation for publishing 5.5 Confirm final report is signed off by authorised personnel 5.6 Distribute report to relevant stakeholders according to evaluation plan |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Identifies, interprets, analyses and reviews complex texts from various sources to determine legislative requirements, organisational operations, specific requirements and responsibilities Checks documents for accuracy of content, grammar, spelling and punctuation |
| Writing | <ul style="list-style-type: none"> Collates and compiles results of research and analysis using technical language and organisational formats Develops materials to convey information, requirements and recommendations using language and structure appropriate to the audience Composes and edits texts, selecting appropriate vocabulary and structure for audience and purpose |

| Skill | Description |
|-------------------------|--|
| Self-management | <ul style="list-style-type: none">Follows policies, procedures and legislative requirements |
| Planning and organising | <ul style="list-style-type: none">Plans, develops, implements and monitors processes for evaluating and reviewing compliance performance |
| Technology | <ul style="list-style-type: none">Uses digital tools and systems to locate, organise and share information effectively |

Unit Mapping Information

Supersedes and is equivalent to BSBCOM502 Evaluate and review compliance.

Supersedes but is not equivalent to BSBCOM602 Develop and create compliance requirements.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD515 Evaluate and review compliance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop outcomes, findings and recommendations regarding an organisation's compliance requirements, on at least two different occasions.

In the course of the above, the candidate must:

- access and interpret information about required compliance standards
- develop an evaluation plan including:
 - preparation of an evaluation methodology
 - preparation and submission of a final report for approval and implementation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- compliance evaluation methods
- sources of data relevant to compliance requirements
- format and content of an evaluation plan and a report
- features of relevant compliance management systems
- organisational policies and procedures
- standards and legislative requirements relevant to compliance.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- standards, laws, regulations, industry and organisational codes and standards relevant to compliance requirements
- data required for the demonstration of the performance evidence
- resources for conducting digital searches.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD516 Develop and monitor processes for the management of breaches in compliance requirements

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and monitor the processes for managing identified breaches in the fulfilment of compliance requirements within an organisation.

This unit applies to individuals who are responsible for evaluating and reporting on the operation and effectiveness of an organisation's compliance management system.

Application of this unit must be consistent with the relevant sections of standards and legislative requirements.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop processes for responding to breaches | 1.1 Collect and interpret information on current compliance requirements applicable to the organisation 1.2 Develop and document procedures for identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements |
| 2. Monitor adherence to compliance requirements | 2.1 Monitor and evaluate organisation's operations and compliance management information systems and identify breaches in compliance requirements 2.2 Review and evaluate information on potential breaches in compliance requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 2.3 Discuss findings with relevant stakeholders and confirm accuracy of compliance assessment |
| 3. Manage the identification and rectification of breaches in compliance | <p>3.1 Assign stakeholders to identify, classify, investigate and rectify breaches in compliance requirements</p> <p>3.2 Inform senior stakeholders of all breaches in compliance requirements and corrective action according to organisational policies and procedures</p> |
| 4. Communicate with relevant stakeholders during breach management | <p>4.1 Communicate breaches and rectification actions with relevant stakeholders</p> <p>4.2 Seek and action advice from relevant stakeholders on the management of breaches in compliance requirements</p> |
| 5. Evaluate the response to and rectification of breaches | <p>5.1 Monitor action to manage and rectify identified breaches in compliance requirements according to organisational policies and procedures</p> <p>5.2 Confirm success in rectification of compliance breaches and notify relevant stakeholders</p> <p>5.3 Identify issues in the rectification of compliance breaches and initiate action, where required</p> <p>5.4 Refer reports of recurring breaches of compliance to relevant stakeholders</p> |
| 6. Document and distribute breach management activities and outcomes | <p>6.1 Document and report identified breaches in compliance requirements in accordance with organisational policies and procedures</p> <p>6.2 Maintain and store records of breaches in compliance requirements</p> <p>6.3 Document and report the action to rectify identified breaches in compliance requirements and the outcomes of this action</p> <p>6.4 Distribute reports on breach management to relevant stakeholders</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Recognises and evaluates complex texts in various forms to determine key information and specific requirements and responsibilities Analyses industry specific complex texts to determine and distinguish |

| Skill | Description |
|--------------------|---|
| | compliance requirements |
| Writing | <ul style="list-style-type: none">• Produces reports matching style of writing to purpose and audience• Documents and records findings using required organisational formats |
| Oral Communication | <ul style="list-style-type: none">• Presents specialised information to a range of audiences using structure and language to suit the audience• Uses active listening and questioning to elicit the views and opinions of others |
| Self-management | <ul style="list-style-type: none">• Organises, plans and sequences own workload and schedules work activities of others |
| Problem solving | <ul style="list-style-type: none">• Systematically gathers, analyses and evaluates all information in order to make informed decisions about management of compliance breaches |
| Technology | <ul style="list-style-type: none">• Uses a range of digitally based technology and applications to access, organise, integrate and share information |

Unit Mapping Information

Supersedes and is equivalent to BSBCOM503 Develop processes for the management of breaches in compliance requirements.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD516 Develop and monitor processes for the management of breaches in compliance requirements

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage at least two different breaches of compliance requirements.

In the course of the above, the candidate must:

- develop, monitor, and communicate processes for the management of breaches
- obtain and keep up to date with organisational compliance requirements
- identify and assign staff to manage breaches
- identify and inform senior management and regulatory authorities of breaches
- report corrective action activities and outcomes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- compliance requirements applicable to organisation
- key elements of compliance management systems, including:
 - documentation of compliance requirements relevant to the organisation
 - functions, accountabilities and responsibilities within the organisation
 - compliance related management information systems
 - breach management policies and procedures
 - compliance reporting procedures
 - process for communication of information on compliance requirements to relevant stakeholders
 - techniques and performance indicators for monitoring the operation of a compliance management system
- potential breaches in compliance requirements

- reporting processes on compliance management.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and organisational policies and procedures relevant to compliance requirements
- data files relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBAUD601 Establish and manage compliance management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish and manage compliance management systems to enable organisations to fulfil their obligations and responsibilities under compliance requirements.

It applies to individuals who have specific responsibility for the planning, development and operation of a compliance management system.

Application of this unit must be consistent with the relevant sections of standards and legislative requirements.

Unit Sector

Technical Skills – Audit and Compliance

Elements and Performance Criteria

| Element | Performance Criteria |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine compliance requirements | 1.1 Collect and interpret information on current compliance requirements applicable to the organisation 1.2 Review compliance requirements according to organisational policies and procedures |
| 2. Identify and select relevant compliance management system | 2.1 Investigate required compliance areas and identify options for compliance management systems 2.2 Compare and select options for compliance management system according to identified organisational compliance requirements |

| Element | Performance Criteria |
|--|---|
| 3. Plan and document required compliance management system | <ul style="list-style-type: none">3.1 Determine and assign resources for the operation of the compliance management system3.2 Identify and document management information systems requirements3.3 Determine and plan strategy for developing compliance management culture, in consultation with relevant stakeholders3.4 Identify and document processes and procedures for identifying, managing and reporting breaches in compliance requirements3.5 Document schedule for implementing, reviewing and maintaining the planned compliance management system, and distribute to relevant stakeholders3.6 Collate documents in compliance management system plan and seek approval from relevant stakeholders3.7 Establish mechanisms for collecting feedback information on compliance management system |
| 4. Establish compliance management system | <ul style="list-style-type: none">4.1 Appoint and distribute information to relevant stakeholders on their compliance management responsibilities4.2 Establish the components of compliance management system in collaboration with relevant stakeholders4.3 Monitor operation of compliance management system in collaboration with relevant stakeholders according to plan |
| 5. Facilitate continuous improvement of compliance management system | <ul style="list-style-type: none">5.1 Monitor and review performance against targets and performance indicators5.2 Analyse feedback and evaluation data and implement improvements5.3 Document and report continuous improvement of compliance management system |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none">• Investigates and evaluates complex texts to determine key information and specific requirements and responsibilities |
| Writing | <ul style="list-style-type: none">• Develops documentation for a specific audience using detailed language to convey information, requirements and |

| Skill | Description |
|---------------------------|--|
| | <ul style="list-style-type: none">recommendationsCollates and compiles data to convey specific information, requirements and recommendations |
| Oral Communication | <ul style="list-style-type: none">Conveys information, which incorporates evaluation of information and specialised and cohesive language, in a format and style appropriate to a specific audienceElicits the views of others by listening and questioning |
| Initiative and enterprise | <ul style="list-style-type: none">Explores and incubates new and innovative ideas through unconstrained analysis and critical thinking to establish and monitor compliance management systems |
| Teamwork | <ul style="list-style-type: none">Collaborates with others to achieve joint outcomes, playing an active role in facilitating understanding |
| Technology | <ul style="list-style-type: none">Uses a range of digitally based technology and applications to access, organise, integrate and share information |

Unit Mapping Information

Supersedes and is equivalent to BSBCOM603 Plan and establish compliance management systems.

Supersedes but is not equivalent to:

- BSBMGT521 Plan, implement and review a quality assurance program
- BSBMGT621 Design and manage the enterprise quality management system.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBAUD601 Establish and manage compliance management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan, establish and monitor one compliance management system in collaboration with relevant stakeholders, including:
 - reviewing organisational compliance requirements
 - documenting an action schedule for implementing, maintaining and reviewing the compliance system
 - appointing and informing staff on compliance management system.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- research methods and techniques
- standards and legislation relevant to organisational compliance requirements
- key elements of compliance management systems, including:
 - documentation of compliance requirements relevant to the organisation
 - functions, accountabilities and responsibilities within the organisation
 - compliance related management information systems
 - record keeping systems required for compliance management
 - continuous improvement processes for compliance, including monitoring, evaluation and review
 - strategies for developing a positive compliance culture within the organisation
 - reporting processes on compliance management, including reports on breaches and rectification action
- organisational policies and procedures, including compliance plans in various compliance areas and organisational standards for operations.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures and documentation relevant to compliance requirements
- interaction with others
- legislation, regulations and standards for compliance.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCMM211 Apply communication skills

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to apply basic communication skills in the workplace, including identifying, gathering and conveying information along with completing assigned written information.

The unit applies to individuals working under direct supervision, who are developing basic skills and knowledge of workplace communication in preparation for working in a broad range of settings.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Verbal Communication

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify communication requirements | 1.1 Identify work task 1.2 Identify communication channels in the organisation 1.3 Identify relevant stakeholders 1.4 Seek advice from supervisor on communication methods |
| 2. Communicate using verbal and non-verbal communication skills | 2.1 Plan verbal communication 2.2 Use verbal communication to communicate with stakeholders 2.3 Use non-verbal behaviour to communicate with stakeholders 2.4 Seek and respond to feedback on communication |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|--|
| 3. Draft written communications | 3.1 Identify formats for written information according to organisational policies and procedures 3.2 Draft written information and submit to supervisor for approval 3.3 Seek and respond to feedback on written communication |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Learning | <ul style="list-style-type: none">Develops skills required to carry out own role by seeking and acting on feedback |
| Reading | <ul style="list-style-type: none">Reviews textual information to identify communication requirements and organisational procedures |
| Writing | <ul style="list-style-type: none">Drafts simple texts using appropriate grammar, spelling and punctuation in accordance with organisational standardsProofreads own texts for accuracy and compliance with organisational requirements |
| Teamwork | <ul style="list-style-type: none">Seeks to cooperate with others to achieve results in immediate work context |
| Self-management | <ul style="list-style-type: none">Follows clearly defined instructions, seeking assistance when necessaryFollows organisational policies and procedures and practices relevant to own role |
| Technology | <ul style="list-style-type: none">Uses digital tools to complete tasks |
| Initiative and enterprise | <ul style="list-style-type: none">Asks questions and listens to gain information and confirm understanding |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBCMM101 Apply basic communication skills
- BSBCMM201 Communicate in the workplace.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCMM211 Apply communication skills

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use verbal and non-verbal skills to seek and convey information in face-to-face situations on at least three occasions
- draft written documents and confirm that the documents meet organisational requirements on at least three occasions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures related to workplace communication
- communication styles
- questioning, listening and speaking skills
- standards of written information applicable to own role
- presentation styles, format and detail relevant to own role.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace policies and procedures relating to communication.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCMM411 Make presentations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit covers the skills and knowledge required to prepare, deliver and review presentations for target audiences.

This unit applies to individuals who may be expected to make presentations for a range of purposes, such as marketing, training and promotions. They contribute well developed communication skills in presenting a range of concepts and ideas.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Verbal Communication

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare presentation | 1.1 Plan presentation approach and intended outcomes 1.2 Identify target audience, location and resources requirements 1.3 Select presentation strategies, format and delivery methods according to presentation requirements 1.4 Select techniques to evaluate presentation effectiveness |
| 2. Deliver presentation | 2.1 Summarise key concepts and ideas and present to target audience 2.2 Provide opportunity for audience to seek clarification on presentation information 2.3 Confirm target audience understand key concepts and ideas, and |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------|--|
| | that identified presentation objectives have been achieved |
| 3. Review presentation | 3.1 Evaluate effectiveness of the presentation 3.2 Seek and discuss feedback and any reactions to the presentation from participants and relevant stakeholders 3.3 Make changes to presentation based on feedback received |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Reviews and analyses documents to identify information relevant to a specific presentation |
| Writing | <ul style="list-style-type: none"> Develops material to convey ideas and information to target audience in an engaging way |
| Oral Communication | <ul style="list-style-type: none"> Presents information using words and non-verbal features appropriate to the audience and context Uses listening and questioning techniques to gather information required to develop and modify presentations |
| Problem solving | <ul style="list-style-type: none"> Interprets audience reactions and changes words and non-verbal features accordingly |
| Planning and organising | <ul style="list-style-type: none"> Demonstrates sophisticated control over oral, visual and written formats, drawing on a range of communication practices to achieve goals |
| Initiative and enterprise | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols to encourage interaction and to present information Recognises the need to alter personal communication style in response to the needs and expectations of others |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks and own workload to achieve outcomes |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBCMM401 Make a presentation.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCMM411 Make presentations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare and deliver at least two different presentations.

In the course of the above, the candidate must:

- use aids and materials to support the presentation
- select and implement methods to review the effectiveness of presentation and document suggested improvements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- information collection methods that support review and feedback of presentations
- organisational and legislative obligations and requirements relevant to presentations
- structure of presentations according to intended outcomes
- principles of effective communication including:
 - persuasive communication techniques
 - verbal and non-verbal communication
- presentation methods
- different aids, materials and techniques that can be used for presentations.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- equipment, materials and business software packages for making a presentation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCMM412 Lead difficult conversations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prepare, facilitate and lead difficult conversations.

The unit applies to individuals who may work as managers and leaders, and are required to lead difficult conversations in the workplace. They contribute well developed verbal and relationship building skills in having difficult conversations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Verbal Communication

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for conversation | 1.1 Identify conversational requirements 1.2 Identify, gather and develop materials required for the conversation according to organisational policies and procedures 1.3 Organise the logistics and stakeholders required for the conversation 1.4 Seek feedback from relevant personnel on conversational content 1.5 Review conversational content and make changes according to feedback received 1.6 Select delivery style according to conversational context and |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|--|
| | stakeholder requirements according to legislation requirements and codes of practice |
| 2. Facilitate difficult conversation | 2.1 Undertake conversation with relevant stakeholders 2.2 Provide opportunity for stakeholder input 2.3 Confirm relevant stakeholders understand conversation and outcomes 2.4 Document relevant points of conversation 2.5 Refer stakeholders to relevant support services, as required |
| 3. Follow up and review conversation | 3.1 Evaluate own effectiveness in the conversation 3.2 Seek and respond to feedback from relevant personnel on personal performance 3.3 Identify areas of improvement for undertaking difficult conversations according to feedback received |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Reviews and analyses documents to identify information relevant to a specific conversation |
| Writing | <ul style="list-style-type: none"> Develops material to convey ideas and information to target audience in an engaging way |
| Oral Communication | <ul style="list-style-type: none"> Presents information using words and non-verbal features appropriate to the audience and context |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks and own workload to achieve outcomes |
| Initiative and enterprise | <ul style="list-style-type: none"> Demonstrates sophisticated control over oral, visual and written formats, drawing on a range of communication practices to achieve goals |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital tools to complete work tasks |
| Problem solving | <ul style="list-style-type: none"> Recognises the need to alter personal communication style in response to the needs and expectations of others Interprets audience reactions and changes words and non-verbal features accordingly Uses feedback from others, and analytical and lateral thinking to |

| Skill | Description |
|-------|--|
| | review current practices and develop new ideas |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCMM412 Lead difficult conversations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead at least two difficult conversations in the workplace.

In the course of the above, the candidate must:

- adapt delivery style and tone according to the mood of the conversation
- understand and react to relevant personnel using conviction and empathy.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, standards and codes of practice relating to workplace communication
- workplace policies and procedures relevant to communication
- communication styles
- delivery styles, tones and techniques of communication, including:
 - verbal and non-verbal communication
 - conviction and empathy
- common support services.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry. This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCMM511 Communicate with influence

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to present and negotiate persuasively, lead and participate in meetings and make presentations to customers, clients and other key stakeholders.

The unit applies to individuals who are managers and leaders required to identify, analyse, synthesise and act on information from a range of sources, and who deal with unpredictable problems as part of their job role. They use initiative and judgement to organise the work of self and others and plan, evaluate and co-ordinate the work of teams.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Verbal Communication

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify communication requirements | 1.1 Confirm authority to present material on behalf of an organisation or work area, according to organisational policies and procedures 1.2 Identify information that may be subject to confidentiality and manage appropriately 1.3 Identify information needs of audience and prepare a position in line with purpose of communication |
| 2. Negotiate to achieve agreed outcome | 2.1 Identify objectives of negotiation, and needs and requirements of stakeholders |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|--|
| | 2.2 Identify and document potential issues and problems 2.3 Prepare positions and supporting arguments according to objectives 2.4 Communicate with stakeholders, and establish areas of common ground and potential compromise 2.5 Confirm and document outcomes of negotiation |
| 3. Participate in and lead meetings | 3.1 Identify the need for meeting and schedule according to stakeholder availability 3.2 Prepare meeting materials and distribute to stakeholders 3.3 Conduct meeting and contribute to discussions 3.4 Seek consensus on meeting objectives 3.5 Summarise outcomes of meetings and distribute to stakeholders |
| 4. Make presentations | 4.1 Identify forums to present according to organisational objectives 4.2 Determine tone, structure, style of communication and presentation according to target audience 4.3 Prepare presentation according to desired outcomes 4.4 Provide an opportunity for audience to ask questions 4.5 Follow up with stakeholders following presentation 4.6 Evaluate presentation and identify areas for improvement |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Writing | <ul style="list-style-type: none"> Prepares documentation that summarises key findings and outcomes Prepares presentations appropriate to audience needs, context and purpose |
| Oral Communication | <ul style="list-style-type: none"> Uses active listening and questioning to seek information and confirm understanding |
| Teamwork | <ul style="list-style-type: none"> Selects and uses relevant conventions and protocols when communicating with team members |
| Self-management | <ul style="list-style-type: none"> Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals |
| Problem solving | <ul style="list-style-type: none"> Uses analytical processes to evaluate options, and aid in problem-solving and decision-making |

| | |
|---------------------------|--|
| | <ul style="list-style-type: none">Plays a lead role in situations requiring negotiation and collaboration, demonstrating high level conflict resolution skills and ability to engage and motivate others |
| Initiative and enterprise | <ul style="list-style-type: none">Adapts personal communication style to build trust and positive working relationships and to show respect for the opinions and values of othersUnderstands the implications of legal and ethical responsibilities to maintain confidentialitySelects relevant vocabulary adjusting language and presentation features to maintain effectiveness of interaction |
| Planning and organising | <ul style="list-style-type: none">Plans, organises and implements tasks required to achieve required outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBLDR513 Communicate with influence.

Supersedes but is not equivalent to:

- BSBCMM402 Implement effective communication strategies
- BSBGOV404 Communicate with community stakeholders.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCMM511 Communicate with influence

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- participate in and lead at least two meetings
- prepare and make a presentation to two different groups.

In the course of the above, the candidate must:

- communicate with key stakeholders to position the business to best effect including:
 - listening actively
 - understanding information needs of others
 - adapting communication to suit the audience
 - identifying suitable platform for presentations
 - presenting reliable information
 - designing the presentation to meet the needs of the audience
 - answering questions clearly and concisely.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- industry, media and government organisations, events and communication channels that are relevant to the organisation
- cross-cultural communication
- techniques for negotiation, mediation, conflict resolution and incident de-escalation
- structured and inclusive meeting procedures
- organisational policies and procedures relevant to:
 - presenting and negotiating
 - leading and participating in meetings
 - making presentations

- communication tone, structure, style and impact on others
- relevant organisational policies and procedures on confidentiality of information.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- organisation information, including organisational structure, goals, objectives and plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCNV511 Take instructions in relation to a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to take instructions from a potential client to initiate a conveyancing transaction.

The unit applies to individuals who communicate with clients to establish the client's needs, and identify conflicts of interest, parties, properties and other interests, and determine terms of engagement and contingency strategies.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Companion Volume Implementation Guide or the relevant regulator for specific guidance on requirements.

Unit Sector

Technical Skills – Conveyancing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish client needs | 1.1 Identify and verify the client identity according to practice policies and procedures 1.2 Identify and clarify client needs and expectations according to practice policies and procedures 1.3 Determine and discuss optional courses of action with client 1.4 Check information and documentation in relation to the transaction for accuracy and relevance 1.5 Obtain mutual agreement regarding responsibilities, obligations and expectations of all parties to the transaction |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 1.6 Record and document client's needs and responsibilities |
| 2. Identify any conflict of interest | 2.1 Identify and record existing or potential conflicts of interest associated with the transaction 2.2 Evaluate conflicts of interest and determine required action for the client and practice, and advise client of any necessary action |
| 3. Identify parties, properties and other interests | 3.1 Identify the roles of various parties involved in the conveyancing transaction 3.2 Analyse estates and interests in land according to relevant transaction 3.3 Analyse relevant searches, Certificates of Title and other relevant documents and confirm facts pertaining to the transaction 3.4 Communicate to the client the title and contract details and respective consequences of the conveyancing transaction |
| 4. Determine terms of engagement | 4.1 Document terms of engagement which comply with legislative, regulatory and practice requirements and articulate to client clearly and promptly 4.2 Establish and record client's agreement with terms 4.3 Obtain relevant authorities from client and other relevant parties 4.4 Verify identity of client according to firm policies and procedures 4.5 Check estimates of fees, disbursements and time for accuracy and completeness and provide to client |
| 5. Determine contingency strategies | 5.1 Identify contingencies relating to the transaction and advise the client 5.2 Determine contingency strategies and options and agree in consultation with client |
| 6. Initiate the transaction | 6.1 Select a course of action which meets the client's needs according to legislative requirements and practice policy and procedures 6.2 Advise client of all actions to be implemented to meet their agreed needs and expectations 6.3 Confirm and record instructions from client to proceed or not to proceed 6.4 Make referrals to other professionals or third parties, where required 6.5 Formally open, organise and document all relevant instructions, information, facts and evidence in client file |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none">Accesses and interprets documentation from a variety of sources checking for accuracy, completeness and relevance |
| Writing | <ul style="list-style-type: none">Records information using correct spelling, grammar and terminology in organisational formatsPrepares files and correspondence using logical structure and language appropriate for purpose and audience |
| Oral Communication | <ul style="list-style-type: none">Uses questioning and active listening to determine and confirm client requirements and to share informationUses language and concepts appropriate to audience when participating in verbal interactions |
| Numeracy | <ul style="list-style-type: none">Performs mathematical calculations to check accuracy and completeness of numerical and financial data with a focus on identifying errors and discrepanciesAnalyses, records and consolidates financial information |
| Self-management | <ul style="list-style-type: none">Takes full responsibility for ensuring that documentation and processes comply with legislative requirements and practice policies |
| Problem solving | <ul style="list-style-type: none">Anticipates potential problems and develops contingency plans |
| Planning and organising | <ul style="list-style-type: none">Plans, organises, implements and reviews actions needed to achieve objectives effectively and efficiently |
| Technology | <ul style="list-style-type: none">Uses the main features and functions of digital tools to complete work tasks and to access information |

Unit Mapping Information

Supersedes and is equivalent to BSBCNV501 Take instructions in relation to a transaction.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCNV511 Take instructions in relation to a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- initiate at least three conveyancing transactions according to client requirements, and practice policies and procedures.

In the course of the above, the candidate must:

- communicate with a client and identify their needs
- interpret and document parties, properties and other interests and legal consequences
- determine terms of engagement and contingency strategies
- record client details and requirements and initiate a transaction according to practice policies and procedures and relevant legislation
- perform a verification of identity process of a client or refer a client to a qualified Verification of Authority agent.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key principles and laws applicable to conveyancing, business and personal transactions
- definitions of conflict of interest within legislation and the industry
- current legislative, regulatory and industry practices, procedures and services
- policies, procedures and business requirements of the practice
- common professional and industry terminology
- relevant legal requirements of consumer protection compliance
- relevant types of contract titles for the sale of land, Certificates of Title, interests in land and other required documentation
- key types of transactions for personal, business and real estate conveyancing.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- assessment records showing the establishment of a relationship with a conveyancing client.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCNV512 Finalise the conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to complete conveyancing transactions and verify that all matters relating to arranging settlement, determining contingency strategies, completing transactions, and implementing post-transaction procedures and using Electronic Lodgement Network Operators (ELNOs), where required.

The unit applies to individuals who use specialised knowledge, systematic approaches and strong organisational skills to prepare and process conveyancing transactions efficiently.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Companion Volume Implementation Guide or the relevant regulator for specific guidance on requirements.

Unit Sector

Technical Skills – Conveyancing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Arrange settlement | 1.1 Identify all parties to the transaction and take all relevant actions to ensure they are ready to complete the transaction 1.2 Fulfil transaction requirements and confirm completeness 1.3 Identify and collate information relevant to preparation of settlement statements and prepare and reconcile statements 1.4 Identify funds pertaining to the completion of the transaction and advise relevant parties 1.5 Ensure funds required for the completion of the transaction are received within the required timeframe |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 1.6 Arrange settlement with all relevant parties and invite participants to an Electronic Network Operator's settlement space, where required 1.7 Attend the settlement, where required 1.8 Confirm documents are stamped and relevant duty is paid according to legislative, regulatory and the practice's requirements |
| 2. Determine contingency strategies | 2.1 Identify unfulfilled contractual obligations and assess possible contingencies 2.2 Identify and evaluate a range of contingency strategies and options and articulate these to the client 2.3 Determine strategies and options in consultation with client and according to practice policies and procedures, and legislative, regulatory, contractual and professional requirements |
| 3. Complete transaction | 3.1 Confirm transaction arrangements with all relevant parties and verify conditions for the finalisation of the transaction 3.2 Arrange and perform final searches and inspections, where required 3.3 Examine transaction documents for accuracy and completion 3.4 Complete transaction with all relevant parties 3.5 Lodge stamped documents for registration according to legislative and practice requirements |
| 4. Implement post-transaction procedures | 4.1 Advise all relevant parties of transaction completion 4.2 Make outstanding payments 4.3 Monitor and conclude outstanding matters 4.4 Confirm registration change on title, where required 4.5 Return documents to client and third parties 4.6 Receive and disburse funds as authorised 4.7 Prepare and dispatch invoices to client and other parties 4.8 Update financial, business and client records 4.9 Close and archive file according to legislative, regulatory, contractual and practice requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------|-------------|
|-------|-------------|

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none">Interprets and analyses a range of information relevant to key steps within a process |
| Writing | <ul style="list-style-type: none">Prepares correspondence for a range of audiences and completes forms accurately using correct language, concepts and terminology |
| Oral Communication | <ul style="list-style-type: none">Participates effectively in verbal exchanges using questioning and active listening to determine and confirm requirements and instructions |
| Numeracy | <ul style="list-style-type: none">Performs mathematical calculations to check accuracy and completeness of numerical and financial dataGathers, interprets, analyses, consolidates and records financial information |
| Self-management | <ul style="list-style-type: none">Takes full responsibility for ensuring that all documentation and processes comply with legislative and practice requirements |
| Planning and organising | <ul style="list-style-type: none">Plans, organises, and implements tasks for effective and efficient outcomes, and in accordance with statutory and organisational requirements |
| Problem solving | <ul style="list-style-type: none">Uses problem solving processes to identify and analyse conveyancing issuesAnticipates potential problems and implements contingency plans, where required |
| Technology | <ul style="list-style-type: none">Uses the main features and functions of digital tools to complete work tasks and to access information |

Unit Mapping Information

Supersedes and is equivalent to BSBCNV505 Finalise the conveyancing transaction.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCNV512 Finalise the conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- complete and finalise a conveyancing transaction on at least three occasions.

In the course of the above, the candidate must:

- arrange and attend, or electronically attend, settlement and confirm completion of all instructions and requirements, including:
 - adjustments of relevant outgoings and other fees
 - confirmation of final payments
 - verification of accuracy of documents
- complete settlement transaction that meets:
 - agency or practice organisational policies and procedures
 - legislative requirements of settlement transactions
 - contractual requirements
 - client requirements
- monitor progress where actions are delayed, extended or rescheduled and determine contingency strategies for settlement where contractual obligations remain unfulfilled
- implement post-transaction procedures, where required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key roles of relevant parties in a settlement
- transaction requirements, including electronic requirements
- file reconciliation procedures and other financial procedures relevant to settlement transactions

- conditions for the finalisation of the transaction, including compliance with special conditions
- key features of:
 - formal and informal industry codes of practice governing settlement procedures
 - land registry policies and procedures for ensuring relevant documentation is lodged and registered on the relevant Certificate of Title
 - legislation, regulations and common law principles relevant to settlement transactions
 - practice, policies and procedures in relation to transaction settlement and client management
- monitoring procedures and solutions where actions are delayed, extended or rescheduled
- compliance requirements of land registry and other relevant agencies
- regulations and procedures of relevant government agencies, including revenue offices and land registries, relating to settlement transactions.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- suitable records showing the completion of a settlement transaction.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCNV611 Interpret a legal document and provide advice in a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to read and interpret legal documents and provide advice to conveyancing clients within a range of contexts and environments. It includes defining the nature and function of documents in a transaction and advising the client about their rights, obligations and alternative courses of action, where required.

The unit applies to individuals who apply specialised knowledge and exercise attention to detail when interpreting, analysing and providing advice to others on complex legal documentation for a conveyancing transaction.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Companion Volume Implementation Guide or the relevant regulator for specific guidance on requirements.

Unit Sector

Technical Skills – Conveyancing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assess relevant legal principles | 1.1 Identify and document statutory and common law principles governing legal document and its function in conveyancing transaction 1.2 Identify and document rules governing construction and interpretation of contracts and other legal documents 1.3 Identify and document rules for use of precedents, standard form contracts, and statutory forms |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|---|
| | 1.4 Conduct legal research, as required |
| 2. Identify interests of client | <p>2.1 Identify legal interests of the client in relation to subject matter of legal document</p> <p>2.2 Identify terms essential to protect client's interests</p> <p>2.3 Identify non-legal interests and other needs of the client in relation to the subject matter of the document</p> |
| 3. Evaluate document | <p>3.1 Check parties, property, Certificate of Title/s, information and factual details are accurate and relevant</p> <p>3.2 Check annexures to the document are accurate and relevant</p> <p>3.3 Check legal document or an annexure for compliance if it is required to comply with a procedural or formal requirement</p> <p>3.4 Check legal document or annexure for compliance with statutory and practice requirements if it comprises a statutory or prescribed form</p> <p>3.5 Identify information to be obtained from or provided to third parties or other professionals in relation to legal document</p> |
| 4. Examine document | <p>4.1 Examine legal document and interpret and analyse relevant legal principles and key terms</p> <p>4.2 Identify and assess rights, responsibilities and liabilities of all parties, expressed or implied in legal document</p> <p>4.3 Identify conformity with client's initial instructions and any gaps, lack of certainty or ambiguity in the language</p> <p>4.4 Identify any non-compliance with legal requirements within legal document</p> |
| 5. Evaluate issues | <p>5.1 Assess legal and non-legal issues and risks to the client arising from legal document</p> <p>5.2 Interpret extent to which legal document does or does not protect interests of client</p> <p>5.3 Interpret key terms or points for negotiation or referral with third parties or other professionals</p> |
| 6. Advise client | <p>6.1 Summarise and communicate rights, responsibilities and liabilities of all parties to client, including specific rights of client</p> <p>6.2 Summarise and communicate legal and non-legal issues and risks arising from legal document to client</p> |
| 7. Clarify instructions | <p>7.1 Determine and discuss alternative courses of action with client where it is considered legal document does not adequately protect interests of client, or meet client's other requirements</p> <p>7.2 Summarise and clearly communicate legal and non-legal consequences for each alternative to the client</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|---|
| | 7.3 Assist client in selecting a course of action 7.4 Refer client to other professionals for advice on appropriate course of action, where required |
| 8. Attend to signing legal document | 8.1 Identify statutory and other rules governing signing and witnessing of legal documents 8.2 Apply relevant rules governing signing and witnessing of documents in the execution of legal document by client |
| 9. Document advice | 9.1 Prepare file note recording the substance and details of the advice given to client and instructions received 9.2 Despatch correspondence to client confirming advice given in relation to legal document and instructions received 9.3 Provide concise instructions on signing and witnessing legal document, where required |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Accesses and interprets complex legal documentation from a variety of sources using detailed criteria to closely examine, analyse and check for accuracy, completeness and relevance |
| Writing | <ul style="list-style-type: none"> Records and synthesises information accurately using correct writing mechanics and organisational formats Prepares files and correspondence using logical structure and language and concepts appropriate for purpose and audience |
| Oral Communication | <ul style="list-style-type: none"> Uses questioning and active listening to determine and confirm requirements and understanding Presents complex information using vocabulary, tone and pace appropriate for the audience and purpose |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises, and implements processes to complete required tasks efficiently and according to statutory and organisational requirements |
| Problem solving | <ul style="list-style-type: none"> Uses analytical thinking to anticipate potential problems and form contingency plans |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital tools to complete work tasks and to access information |

Unit Mapping Information

Supersedes and is equivalent to BSBCNV502 Read and interpret a legal document and provide advice.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCNV611 Interpret a legal document and provide advice in a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- review and interpret legal documents correctly and explain meanings and implications to clients on at least three occasions.

In the course of the above, the candidate must:

- compare legal requirements with client instructions
- prepare written or verbal advice for clients
- maintain accurate and thorough records.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- principles of law applicable to reading and interpreting legal documents and transactions
- nature of relevant legal documents
- key features of:
 - transactions for personal, business or real estate conveyancing
 - contracts for the sale or lease of land and other documents used in conveyancing
- current legislative, regulatory and industry practices, procedures and services
- insurance requirements relevant to a conveyancing transaction, including title insurance
- policies, procedures and business requirements of the practice
- relevant consumer protection compliance requirements
- rules and procedures related to:
 - precedents, templates and statutory forms
 - construction and interpretation of documents.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- assessment records showing the preparation of a variety of legal documents to support a conveyancing transaction.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCNV612 Identify and apply legal requirements for a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to analyse and interpret legal requirements for conveyancing transactions within a range of contexts and environments. It encompasses identifying and applying statutory interpretation techniques, identifying and tracking changes to relevant legislation and codes of conduct, and maintaining appropriate records.

It applies to individuals who use specialised knowledge and skills to research and evaluate complex information and compliance requirements and apply that information to relevant tasks.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Companion Volume Implementation Guide or the relevant regulator for specific guidance on requirements.

Unit Sector

Technical Skills – Conveyancing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Interpret legal principles and legislative requirements | 1.1 Identify conveyancing practice's legal framework 1.2 Access legislation and regulations relevant to the provision of conveyancing services 1.3 Interpret relevant legislation and its application to conveyancing practice 1.4 Identify and analyse relevant case law for relevant legal |

| | |
|---|--|
| | principles |
| 2. Evaluate legislative requirements | 2.1 Interpret and analyse the structure of legislation and regulations that relate to conveyancing transactions 2.2 Analyse common interpretation problems 2.3 Apply interpretation rules and techniques relating to legislation and regulations in conveyancing transactions |
| 3. Track and interpret changes to legislation and regulations | 3.1 Identify processes that lead to changes in legislation and regulations 3.2 Access source documents for amendment legislation relevant to provision of conveyancing services 3.3 Establish process and technique for tracking amendments to legislation and regulations 3.4 Interpret and address implications of changes to legislative and regulatory requirements in line with agency procedures 3.5 Communicate changes to legislative and regulatory requirements to relevant people in line with agency policies and procedures |
| 4. Comply with codes of conduct | 4.1 Source and access relevant codes of conduct 4.2 Interpret relationship between industry codes of conduct and legislative requirements 4.3 Apply key principles and responsibilities of codes of conduct to own work in line with industry practice 4.4 Confirm own ethical behaviour complies with relevant codes of conduct |
| 5. Maintain records of legislation and industry codes | 5.1 Identify practice processes and the personnel responsible for monitoring and communicating changes to legislation and industry codes of conduct 5.2 Maintain relevant records of legislation, regulations and codes of conduct |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Accesses information and uses analytical skills to interpret complex documentation from a variety of sources |
| Writing | <ul style="list-style-type: none"> Prepares complex documents including formal and informal letters, reports and applications |

| | |
|-------------------------|---|
| | <ul style="list-style-type: none"> • Completes forms and maintains records |
| Oral Communication | <ul style="list-style-type: none"> • Participates in verbal exchanges to convey and clarify information with range of personnel |
| Self-management | <ul style="list-style-type: none"> • Takes full responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulations • Understands responsibilities of own role to behave ethically and according to codes of practice |
| Planning and organising | <ul style="list-style-type: none"> • Plans, schedules and implements processes and tasks to maintain currency of legislation, regulation and codes of practice for organisational use |
| Problem solving | <ul style="list-style-type: none"> • Uses problem solving processes to identify, analyse and resolve issues that could have legal consequences |
| Technology | <ul style="list-style-type: none"> • Uses the main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBCNV503 Analyse and interpret legal requirements for a transaction.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCNV612 Identify and apply legal requirements for a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- interpret and comply with legislation and industry codes of conduct relating to conveyancing transactions and agency operations.

In the course of the above, the candidate must:

conduct legal research

communicate key information to clients and other relevant professionals

maintain file records.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legal principles, requirements and amendments affecting conveyancing transactions and agency operations
- industry codes of conduct
- common problems associated with interpreting legislation
- relevant case law
- features of Commonwealth, and State or Territory legislation and local government regulations relating to:
 - contracts of sale of land
 - leases, easements, encumbrances, caveats and planning laws
 - disclosure requirements
 - duties and taxes
 - government fees and registration requirements
 - government reporting requirements
 - insurance

- relevant legislation regarding the payment of a deposit
- estate agents' legislative requirements
- competition and consumer protection
- privacy
- corporations and other legal entities.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- assessment records showing the preparation of a variety of legal documents to support a transaction.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCNV613 Prepare legal documents for a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prepare legal documents to support conveyancing transactions on behalf of clients.

It applies to individuals who use organisational skills to analyse and prepare legal documents suitable for purpose.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Companion Volume Implementation Guide or the relevant regulator for specific guidance on requirements.

Unit Sector

Technical Skills – Conveyancing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine legal nature and relevance of documents | 1.1 Evaluate legal nature of document 1.2 Identify the structure, function and significance of document in conveyancing transaction 1.3 Interpret and apply statutory and general law principles governing document and its function in conveyancing transaction |
| 2. Prepare legal document | 2.1 Identify and apply rules governing construction and interpretation of contracts and other legal documents 2.2 Identify and apply rules for use of precedents, templates, standard form contracts, and statutory forms |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|--|
| | 2.3 Use principles of legal drafting, including use of plain language, to prepare the document |
| 3. Draft and review document | 3.1 Interpret and draft terms essential to protect client's interests 3.2 Review and rectify any lack of conformity with client's instructions |
| 4. Check document | 4.1 Check parties, property information and factual details for accuracy 4.2 Check annexures to document for accuracy and relevance 4.3 Correct gaps, spelling and grammatical errors, lack of certainty or ambiguity in language 4.4 Review and rectify non-compliance with legal principles within document |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Analyses and evaluates complex documentation from a variety of sources checking for accuracy, completeness and relevance |
| Writing | <ul style="list-style-type: none"> Prepares comprehensive, clear and accurate legal documents |
| Oral Communication | <ul style="list-style-type: none"> Uses questioning and active listening to participate in verbal exchanges to convey and clarify information and resolve issues with range of personnel |
| Self-management | <ul style="list-style-type: none"> Takes full responsibility for ensuring that all documentation and processes comply with legislative requirements and principles of legal drafting |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises and implements tasks and workload for efficiency and in accordance with legal and organisational requirements |
| Problem solving | <ul style="list-style-type: none"> Uses problem solving processes to identify, analyse and address issues regarding legal documents |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital tools to complete work tasks and to access information |

Unit Mapping Information

Supersedes and is equivalent to BSBCNV504 Prepare legal documents.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCNV613 Prepare legal documents for a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare legal documents for conveyancing transactions that comply with legislative requirements and client requirements on at least four occasions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- principles and laws applicable to drafting legal documents for conveyancing transactions
- definitions of conflict of interest within legislation and the industry
- current legislative, regulatory and industry practices, procedures and services
- common legal terms
- common professional and conveyancing industry terminology
- common words or terms relevant to drafting legal documents for conveyancing transactions
- contracts and other legal documents relevant to conveyancing transactions
- transactions for personal, business or real estate conveyancing
- policies, procedures and business requirements of relevant practice
- key rules and procedures for:
 - use of precedents, templates and statutory forms
 - construction and interpretation of documents.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- a variety of legal documents to support a transaction.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCNV614 Apply principles of trust accounting

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish, manage and administer trusts or controlled money accounts in a practice. It encompasses reviewing for compliance with trust account requirements, establishing and managing trust accounts, maintaining trust transaction records, and monitoring and reviewing trust accounts.

The unit applies to individuals who use specialised knowledge and systematic approaches to analyse and manage financial information against specified criteria and compliance requirements.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Companion Volume Implementation Guide or the relevant regulator for specific guidance on requirements.

Unit Sector

Technical Skills – Conveyancing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate trust account compliance | <p>1.1 Identify, record and continuously update practice trust account requirements in line with relevant legislation and regulations</p> <p>1.2 Develop policies and procedures for trust account-keeping according to trust account requirements, key principles of accounting and financial management, and legislative requirements</p> <p>1.3 Identify and apply criteria for evaluating electronic or manual trust accounting systems and confirm compliance with trust account requirements</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2. Establish and manage trust accounts | <p>2.1 Identify and access source documents for trust transactions according to legislative requirements and practice policies and procedures</p> <p>2.2 Produce documentation of trust records and transactions and confirm documentation is an accurate record of practice transactions on behalf of clients</p> <p>2.3 Confirm transactions are supported by required authorisation and documentation and according to legislative requirements and practice policies and procedures</p> <p>2.4 Record entries and transactions according to relevant trust account requirements, and provide to relevant stakeholder, where required</p> <p>2.5 Identify discrepancies in entries or documentation and confirm clarification or resolution</p> <p>2.6 Report discrepancies to relevant authorities, where required</p> <p>2.7 Check audit and security arrangements and confirm they provide adequate protection for client confidentiality and client funds held in trust</p> |
| 3. Manage and control trust accounts | <p>3.1 Authorise and manage disbursements between trust and office accounts according to legislative requirements and practice policies and procedures</p> <p>3.2 Make required arrangements with third parties and other professionals and confirm that practice trust accounts comply with legislative requirements</p> <p>3.3 Distribute practice trust administration policies and procedures to relevant staff according to practice and legislative requirements</p> <p>3.4 Facilitate continuous training for relevant practice staff according to legislative requirements and practice policies and procedures</p> <p>3.5 Develop and implement procedures for monitoring records and ensuring the security of trust account records</p> |
| 4. Monitor and review trust accounts | <p>4.1 Review documentation and other reporting requirements for compliance with legislative requirements</p> <p>4.2 Check and monitor trust account entries and transactions and confirm compliance with legislative requirements and practice policies and procedures</p> <p>4.3 Monitor trust account transactions and confirm authorisation is obtained prior to any disbursements</p> |
| 5. Authorise and verify trust accounts | <p>5.1 Verify periodic reconciliation in compliance with legislative requirements</p> <p>5.2 Prepare and discuss periodic financial reports with clients and</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| | identify issues, where required 5.3 Maintain records for convenience and auditing 5.4 Meet legislative audit requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Updates and builds own knowledge and personal competence in order to provide training and mentoring to others |
| Reading | <ul style="list-style-type: none"> Reviews and analyses financial information and data from a range of sources to check accuracy and completeness and to identify key aspects relevant to requirements |
| Writing | <ul style="list-style-type: none"> Records information and prepares documentation using clear and accurate language to convey and clarify explicit information and requirements |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using active listening and questioning techniques to clarify information and confirm understandings with a range of personnel |
| Numeracy | <ul style="list-style-type: none"> Analyses and evaluates complex financial information and data against a range of criteria Performs mathematical calculations to complete tasks and to check accuracy and completeness of financial information |
| Self-management | <ul style="list-style-type: none"> Takes full responsibility for compliance with legislative and organisational requirements Maintains knowledge of legislative and practice requirements relevant to current role |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises and implements processes to complete required tasks efficiently and in compliance with legislative and practice requirements |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital tools to complete work tasks and to access information |

Unit Mapping Information

Supersedes and is equivalent to BSBCNV506 Establish and manage a trust account.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCNV614 Apply principles of trust accounting

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- establish, administer and manage a trust in a practice on at least two occasions.

In the course of the above, the candidate must:

- comply with statutory and legislative requirements for the operation of trust accounts
- use standard accounting principles and financial management practices
- follow practice policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- accounting and bookkeeping techniques for financial control
- auditing and reporting requirements relevant to trust account operations
- professional and ethical behaviour relevant to managing trust accounts
- legislative and professional requirements relating to client security, privacy and confidentiality
- features of commonly used IT and management systems, including trust account management software
- trust account operations
- practice policies and procedures relating to trust and office accounts
- financial, privacy, disclosure and business legislation and regulations relating to trust accounts
- security and ethical privacy procedures in relation to trust account operations
- statutory standards on the operation, reporting and auditing requirements of a trust account
- key processes required to monitor financial performance evaluation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- records showing the establishment and previous management of a practice trust account.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCNV615 Interpret search results for a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to conduct searches and analyse and evaluate all relevant conveyancing data for conveyancing transactions following confirmation of initial instructions from the client.

The unit applies to individuals who use research skills and systematic approaches to organise and collate complex documentation that meets compliance requirements.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Companion Volume Implementation Guide or the relevant regulator for specific guidance on requirements.

Unit Sector

Technical Skills – Conveyancing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify information needs | 1.1 Identify sources of information relevant to the transaction 1.2 Examine documentation and titles and confirm facts relating to transaction 1.3 Define searches to be performed and confirm with client prior to commencement 1.4 Identify and arrange reports and searches with the required bodies according to practice policies and procedures 1.5 Identify applicable fees, taxes, and rebates, and advise client |
| 2. Undertake document | 2.1 Perform searches using relevant methods according to practice |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| investigations | <p>policies and procedure</p> <p>2.2 Establish and record legal positions according to practice policies and procedures</p> <p>2.3 Collect required third-party reports from the relevant bodies</p> |
| 3. Evaluate issues arising with transaction | <p>3.1 Identify, summarise and communicate legal issues and risks to client according to relevant legislation, regulations and practice policies and procedures</p> <p>3.2 Define and clarify clients' rights within transaction and communicate with client</p> <p>3.3 Establish desired outcomes and devise strategies to achieve them in consultation with client</p> <p>3.4 Assess transaction implications for professional indemnity insurance and take relevant action</p> |
| 4. Deal with third parties and other relevant stakeholders | <p>4.1 Identify relevant third parties and other relevant stakeholders</p> <p>4.2 Identify information to be obtained from or provided to third parties and other relevant stakeholders</p> <p>4.3 Conduct consultation with third parties and relevant stakeholders and obtain authorisation</p> |
| 5. Present information relevant to transaction to client | <p>5.1 Present documentation according to relevant legislation and regulations and practice policies and procedures</p> <p>5.2 Record and document information necessary for transaction to proceed in a legally binding manner in client files</p> <p>5.3 Advise client of the implications of all information received from or forwarded to relevant parties</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Gathers and collates documentation from a variety of sources Analyses and reviews information for accuracy, completeness and relevance |
| Writing | <ul style="list-style-type: none"> Records and maintains information Prepares correspondence and documents clearly and concisely using correct language, concepts and terminology appropriate for purpose and audience |
| Oral | <ul style="list-style-type: none"> Participates effectively in verbal exchanges, using questioning and |

| Skill | Description |
|-------------------------|--|
| Communication | active listening |
| Numeracy | <ul style="list-style-type: none">Analyses, records and consolidates financial information and numerical dataPerforms mathematical calculations to determine fees and taxes |
| Self-management | <ul style="list-style-type: none">Recognises and responds to relevant legislative requirements, explicit and implicit protocols, policies and procedures and meets expectations associated with own role |
| Planning and organising | <ul style="list-style-type: none">Takes responsibility for developing and implementing organisational processes that comply with legislative requirements and achieve required outcomes |
| Problem solving | <ul style="list-style-type: none">Systematically gathers and analyses all relevant information and evaluates options to solve problems or make decisions |
| Technology | <ul style="list-style-type: none">Uses digital technologies to access, extract and share relevant information to achieve required outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBCNV601 Identify and conduct searches.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCNV615 Interpret search results for a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify information needs, complete searches and evaluate and communicate collected information for a conveyancing transaction on at least three occasions.

In the course of the above, the candidate must:

- communicate with a client and third parties involved in a transaction
- request and record search information from authorities and third parties
- assess transaction risk
- present clear, concise and accurate information in relation to a transaction.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- business principles and law applicable to conveyancing transactions
- current legislative, regulatory and industry practices, procedures and services
- professional and industry terminology
- consequences of searches relevant to the conveyancing transaction
- procedures and practices for conducting searches
- relevant practice policies and procedures
- registration procedures and strategies
- procedures for risk assessment and evaluation strategies
- relevant types of document searches, for personal, business or real estate conveyancing.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- records showing the conduct of conveyancing search.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCNV616 Comply with tax obligations in a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to research and identify tax obligations for a conveyancing transaction within a range of contexts and environments. It encompasses identifying and applying statutory interpretation techniques, identifying and tracking changes to relevant legislation and codes of conduct, maintaining appropriate records, using online platforms to calculate and pay tax, and complying with reporting obligations.

The unit applies to individuals who use specialised knowledge and skills to research and evaluate complex information and tax obligations and apply that information to relevant tasks.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the BSB Companion Volume Implementation Guide or the relevant regulator for specific guidance on requirements.

Unit Sector

Technical Skills – Conveyancing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Research tax obligations | 1.1 Identify reliable sources for research information relevant to practice policies and procedures 1.2 Create and document research strategy and confirm that it contains research of state and federal tax obligations that apply to conveyancing transactions 1.3 Implement research strategy and collect all relevant information |
| 2. Identify tax obligations | 2.1 Identify type of conveyancing transaction that requires tax to be |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|---|
| relevant to transaction | <p>paid or withheld</p> <p>2.2 Identify parties involved in conveyancing transaction</p> <p>2.3 Assess conveyancing transaction details against research and identify tax obligations</p> <p>2.4 Identify relevant tax reduction schemes and exemptions according to completed research that may reduce tax payable</p> <p>2.5 Assess conveyancing transaction details against tax reduction scheme eligibility criteria</p> <p>2.6 Calculate amount of tax to be paid or withheld from transaction, where required</p> <p>2.7 Consult relevant legal or accounting specialists and confirm own assessment, where required</p> <p>2.8 Document tax obligations that apply to conveyancing transaction</p> |
| 3. Apply obligations to transaction | <p>3.1 Communicate identified tax obligations, withholding amounts, reduction schemes, and exemptions to client</p> <p>3.2 Apply relevant tax reductions schemes and exemptions, where required</p> <p>3.3 Pay or withhold relevant amount of tax, where required</p> |
| 4. Record and lodge tax obligations | <p>4.1 Identify relevant online platform and download forms according to legislation, regulation, standards and practice policies and procedures</p> <p>4.2 Interpret forms and complete using transaction details</p> <p>4.3 Confirm procedure to lodge completed forms</p> <p>4.4 Lodge forms with relevant authorities</p> <p>4.5 Record all details of transaction and lodgement according to practice policies and procedures</p> |
| 5. Finalise and file records | <p>5.1 Identify records required to be archived according to legislation, regulation, standards and practice policies and procedures</p> <p>5.2 Close and archive records according to legislative, regulatory and practice policies and procedures</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Accesses information and uses analytical skills to interpret complex |

| | |
|-------------------------|---|
| | documentation from a variety of sources |
| Writing | <ul style="list-style-type: none">• Uses correct language and terminology to prepare complex documents including formal and informal letters, reports and applications• Accurately completes forms and maintains records |
| Oral Communication | <ul style="list-style-type: none">• Effectively participates in verbal exchanges to convey and clarify information with a range of stakeholders |
| Planning and organising | <ul style="list-style-type: none">• Plans, schedules and implements processes and tasks to maintain currency of legislation, regulation and codes of practice for organisational use |
| Self-management | <ul style="list-style-type: none">• Takes full responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulations |
| Problem-solving | <ul style="list-style-type: none">• Uses problem solving processes to identify, analyse and resolve issues that could have legal consequences |
| Technology | <ul style="list-style-type: none">• Uses main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCNV616 Comply with tax obligations in a conveyancing transaction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on three occasions, research, apply, and record tax obligations in a conveyancing transaction according to legislative requirements and practice policies and procedures.

In the course of the above, the candidate must:

- lodge according to tax obligations arising from conveyancing transaction
- create and apply a research strategy to identify all tax obligations
- communicate effectively with client
- archive records according to legislative requirements and practice policies and procedures
- consult with relevant specialists.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of:
 - reliable sources of information
 - research strategies
 - types of conveyancing transactions
 - relevant reduction schemes and exemptions
 - relevant specialists
 - GST, CGT and other tax requirements and associated calculations
 - method to calculate withholding amount
- current legislative, regulatory and industry practices, procedures and services
- policies, procedures and business requirements of the practice
- common professional and industry terminology
- common types of transactions for personal, business or real estate conveyancing.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- suitable assessment records showing the establishment of a conveyancing client.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCRT201 Develop and apply thinking and problem solving skills

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to solve problems, develop questions and respond to feedback on questions on workplace issues.

The unit applies to individuals, often working under supervision or guidance, who may be required to think critically, ask essential questions and consider answers to those questions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Critical Thinking

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Investigate problem solving | 1.1 Identify key features and role of problem solving in the workplace 1.2 Identify different types of questions and styles of questioning 1.3 Identify basic problem solving techniques 1.4 Collaborate with relevant stakeholders and share ideas on different types of questions, styles of questioning and applicable problem solving techniques 1.5 Identify challenges in the types of questions, styles of questioning and basic problem solving techniques |
| 2. Prepare and ask | 2.1 Select a basic workplace issue within job role to be resolved |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| questions | 2.2 Identify ways to structure questions on identified issue in consultation with relevant stakeholders 2.3 Develop questions to consolidate knowledge of selected issue 2.4 Ask prepared questions to relevant personnel |
| 3. Solve basic workplace issues | 3.1 Document responses to questions asked according to organisational requirements 3.2 Clarify responses given with further questions and comments 3.3 Apply basic problem solving techniques and document responses to workplace issue |
| 4. Seek feedback on questions and problem solving | 4.1 Consult with relevant stakeholders and identify improvements for problem solving process 4.2 Seek feedback on questions, questioning style and problem solving technique from relevant personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Oral communication | <ul style="list-style-type: none"> Uses listening and questioning techniques to obtain specific information and confirm understanding |
| Teamwork | <ul style="list-style-type: none"> Uses accepted practices to discuss ideas with others |
| Planning and organising | <ul style="list-style-type: none"> Develops a plan for the use of information gathered |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBCRT101 Apply critical thinking techniques.

Links

Companion Volume Implementation Guide is found on VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCRT201 Develop and apply thinking and problem solving skills

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare, deliver, document and review a set of questions to consolidate understanding of a workplace issue within own job role on at least two occasions
- apply basic problem solving techniques to a workplace issue on at least four occasions.

In course of doing the above, the candidate must:

- use a range of different types of questions and styles of questioning
- identify potential issues that may arise in problem solving processes
- develop questions designed to consolidate information of selected issue
- ask questions to relevant stakeholders, using further questions and comments to clarify responses provided
- seek feedback on questions developed.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features and processes of critical thinking and problem solving
- basic problem solving techniques
- different types of questions and their relevance to different situations
- effective questioning techniques
- typical blockers to problem solving processes
- role of critical thinking for businesses, the community and at an individual level.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to simulated challenges and situations to demonstrate the application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCRT311 Apply critical thinking skills in a team environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to apply critical thinking skills to generate solutions to workplace problems in a team environment.

The unit applies to individuals who are required to develop and extend their critical and creative thinking skills to different issues and situations. These individuals apply a range of problem solving, evaluation and analytical skills resolve workplace issues within a team context.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Critical Thinking

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to address workplace problem | 1.1 Identify and select workplace problem to address within scope of job role of team members 1.2 Identify organisational and legislative frameworks applicable to selected problem 1.3 Develop questions to identify key issues and challenges of selected problem 1.4 Consult key stakeholders using questions to gather information on selected problem |
| 2. Evaluate solutions for workplace problem | 2.1 Identify a range of critical thinking techniques to generate solutions to selected problem |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.2 Develop solutions using knowledge and experience of team members 2.3 Explain development process for individual solutions generated to team members 2.4 Apply agreed criteria for selecting most suitable option in consultation with team members 2.5 Critically evaluate solutions generated and select solution to be implemented |
| 3. Finalise and review solution development process | 3.1 Present solution to relevant stakeholders with explanation of critical thinking processes involved 3.2 Respond to challenges and questions from stakeholders 3.3 Evaluate critical thinking processes with team members and using feedback received 3.4 Identify critical thinking learnings to apply to individual and team situations |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none"> • Uses questioning as a strategy to expand knowledge • Reflects on existing thinking and current practices to generate new ideas |
| Oral communication | <ul style="list-style-type: none"> • Participates in a verbal exchange of ideas and elicits the view and opinions of others by listening and questioning |
| Reading | <ul style="list-style-type: none"> • Comprehends textual information and integrates ideas and concepts from various sources |
| Writing | <ul style="list-style-type: none"> • Documents observations and experiences related to problem solving |
| Teamwork | <ul style="list-style-type: none"> • Collaborates with others to test, strengthen and explore new ideas and different ways of thinking |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBCRT301 Develop and extend critical and creative thinking skills.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCRT311 Apply critical thinking skills in a team environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- generate and present solutions to a workplace problem on at least two occasions.

In the course of the above, the candidate must:

- identify and analyse workplace problems as part of a team
- develop questions on key challenges of a chosen problem
- consult relevant stakeholders to gather information on workplace problem
- use a range of creative thinking techniques as part of a team to generate ideas or responses to questions or issues
- use critical thinking processes to develop relevant questions and criteria for identified workplace issue
- present to relevant stakeholders and respond to answers
- assess feedback to identify key personal and team learnings.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational and legislative frameworks
- advantages of different perspectives when asking questions
- critical thinking techniques
- applicable criteria to assess potential solutions to workplace issue
- boundaries to be considered when generating ideas and responses
- methods to develop individual critical and creative thinking skills.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to specific challenges and situations to which critical and creative thinking may be applied to workplace problems as part of a team.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCRT411 Apply critical thinking to work practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to use advanced-level critical thinking skills in a workplace context. This includes using methods of analysis, synthesis and evaluation.

The unit applies to individuals who evaluate existing or proposed work practices. These individuals are typically responsible for reviewing or developing work processes, products or services that may be proposed or already existing.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Critical Thinking

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish role of critical thinking in workplace | 1.1 Identify key characteristics of critical thinking processes 1.2 Evaluate situations in which critical thinking concepts are applied in work practices 1.3 Articulate benefits of applying critical thinking practices in the workplace |
| 2. Lead critical thinking process | 2.1 Analyse existing and proposed work practices and identify limitations 2.2 Locate information on selected work practices for the development of solutions 2.3 Determine solutions for workplace limitations using critical |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|---|
| | <p>thinking concepts</p> <p>2.4 Develop a proposal for solutions using a decision-making framework according to organisational policies and procedures</p> <p>2.5 Present ideas for solutions and justify decision making process to relevant stakeholders</p> |
| 3. Develop critical thinking mindset | <p>3.1 Review decision making practices in the work area</p> <p>3.2 Seek feedback from relevant stakeholders on use of critical thinking from relevant stakeholders</p> <p>3.3 Identify areas for self-development in relation to own job role</p> <p>3.4 Develop plan for future process evaluations and incorporate improvements identified</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Learning | <ul style="list-style-type: none"> Reflects on own performance and seeks opportunities to improve own skills and knowledge Identifies the key themes and ideas to be explored and ways to response to and use diverse perspectives |
| Numeracy | <ul style="list-style-type: none"> Interprets and critically analyses numerical data to determine work process requirements |
| Oral communication | <ul style="list-style-type: none"> Articulates ideas and requirements clearly and persuasively using techniques appropriate to audience and environment Participates in a verbal exchange of ideas and elicits the view and opinions of others by listening and questioning |
| Reading | <ul style="list-style-type: none"> Interprets, evaluates and extracts relevant information from a range of texts for work requirements |
| Writing | <ul style="list-style-type: none"> Develops clear workplace documents appropriate to audience and context Selects appropriate channel, format, tone and content to suit purpose and audience |
| Teamwork | <ul style="list-style-type: none"> Seeks to establish interpersonal connections to facilitate work with a diverse range of people |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies the implications of legal and regulatory responsibilities on own work Adheres to implicit and explicit organisational procedures and policies, seeking advice from others if necessary |

| Skill | Description |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Uses systematic processes to gather and analyse information required to make decisions |
| Problem-solving | <ul style="list-style-type: none">• Uses problem-solving skills to evaluate and challenge ideas and move towards solutions |
| Technology | <ul style="list-style-type: none">• Uses features and functions of digital tools and technologies to store and present information |

Unit Mapping Information

Supersedes and is equivalent to BSBCRT404 Apply advanced critical thinking to work processes.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCRT411 Apply critical thinking to work practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop solutions for two different workplace limitations using critical thinking concepts.

In the course of the above the candidate must:

- use a range of critical thinking techniques to identify and address limitations in workplace practices
- ask questions to broaden understanding of task requirements
- use various information sources to provide answers to proposed questions
- develop a proposal to articulate to a broad range of workplace stakeholders a solution to an identified issue
- incorporate feedback and self-reflection to critically assess performance.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- critical thinking concepts and the value of applying such approaches in a work environment
- key characteristics of critical thinking processes
- sources of reliable information relevant to workplace practices
- key components of decision-making frameworks
- features and limitations of workplace practices
- legislative requirements relating to workplace practices
- components of self-evaluation and development.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- technology, software and resources required to implement and maintain internal control procedures
- corporate governance documentation required for role
- organisational operational policies and procedures required for role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCRT412 Articulate, present and debate ideas

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to articulate, present and debate ideas in a work or broader life context using creative techniques in order to provoke response, reaction and critical discussion.

The unit applies to individuals who contribute and present ideas that may be complex in nature and may relate to new products, services, processes or creative works. These individuals are required to communicate ideas persuasively.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Critical Thinking

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish framework for communication | 1.1 Assess purpose of, and audience for communication according to task requirements 1.2 Evaluate advantages and disadvantages of various methods of communication according to task requirements 1.3 Research organisational or legislative frameworks applicable to communication |
| 2. Develop ideas for communication | 2.1 Assess persuasive communication techniques against objectives of communication 2.2 Identify specific ways to provoke and encourage response in individuals or groups in consultation with others |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------|---|
| | 2.3 Consider potential communication challenges and strategies for mitigation 2.4 Research and document selected key ideas for presentation according to objectives of communication |
| 3. Debate and discuss ideas | 3.1 Present substantiated communication to audience 3.2 Facilitate conversations that challenge existing, and explore new, approaches to idea generation 3.3 Respond to questions about communication with relevant information 3.4 Use feedback to refine communication |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Oral communication | <ul style="list-style-type: none">• Articulates ideas and requirements clearly and creatively using techniques appropriate to audience and environment• Participates in a verbal exchange of ideas and elicits the view and opinions of others by listening and questioning• Uses a range of persuasive responses and makes comparisons which show an understanding of topics and concepts |
| Writing | <ul style="list-style-type: none">• Presents clearly written formats, drawing on a range of communication practices to achieve goals |
| Initiative and enterprise | <ul style="list-style-type: none">• Identifies opportunities to develop and apply new ideas and select ideas for implementation• Identifies key themes and ideas to be explored and identifies ways to respond to and use diverse perspectives |
| Technology | <ul style="list-style-type: none">• Uses features and functions of digital tools and technologies to store and present information |

Unit Mapping Information

Supersedes and is equivalent to BSBCRT401 Articulate, present and debate ideas.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCRT412 Articulate, present and debate ideas

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- facilitate a discussion and debate on ideas with at least two different audience types.

In the course of the above, the candidate must:

- evaluate the purpose, audience and legislative and organisational frameworks applicable to task
- identify and analyse methods to elicit responses from audiences in consultation with others
- identify challenges to communication of ideas for mitigation
- research selected ideas for presentation
- adopt persuasive communication techniques
- participate actively in presentation and critical discussion of ideas
- respond constructively to presentation feedback
- use feedback to further refine developed communication.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- ways in which individuals receive and respond to ideas and information, and factors that influence response
- advantages and disadvantages of various methods of communication
- organisational or legislative frameworks applicable to subject or format of communication
- key features of persuasive communication techniques, including storytelling
- methods of researching ideas including:
 - desktop research
 - consultation with relevant experts
- common techniques to tailor comments to audiences.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to opportunities to present, discuss and debate ideas with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCRT413 Collaborate in creative processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to engage in a creative process and reflect on own role in the process.

The unit applies to individuals who are working in creative industries, as well as those involved in broader business and community activities where creative team effort is highly valued.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Critical Thinking

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Enter into a collaborative creative process | 1.1 Identify individual and group responsibilities according to task requirements 1.2 Identify legislative and organisational frameworks applicable to task 1.3 Identify expectations of collaborative process and task outcome with team 1.4 Confirm channels to communicate with team |
| 2. Engage in a collaborative creative process | 2.1 Develop action plan for collaboration 2.2 Establish solutions according to task requirements in collaboration with team |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 2.3 Provide constructive feedback on the ideas of others 2.4 Support team members to meet task requirements |
| 3. Reflect on own role in the collaborative creative process | 3.1 Reflect on personal level of participation, relationships with others and personal behaviour in the collaborative process 3.2 Seek feedback from others on personal contribution and participation 3.3 Identify methods and opportunities to improve collaborative skills |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Reflects on processes and outcomes and identifies some key principles that may be relevant in future situations |
| Oral communication | <ul style="list-style-type: none"> Presents ideas clearly using language and features suitable to diverse audiences Uses listening and questioning techniques to elicit the views and opinions of others and to confirm understanding Actively identifies the requirements of important communication exchanges, selecting appropriate channel, format, tone and content to suit purpose and audience |
| Writing | <ul style="list-style-type: none"> Notes comments, suggestions and ideas for own use |
| Teamwork | <ul style="list-style-type: none"> Looks for ways of establishing connections and building genuine understanding with a diverse range of people Responds to and uses diverse perspectives to enrich the creative process Contributes to creating a climate where people feel comfortable to suggest, explore, adapt and adopt new ideas as a regular part of work life |
| Problem-solving | <ul style="list-style-type: none"> Uses problem-solving skills to evaluate and challenge ideas and move towards solutions |
| Self-management | <ul style="list-style-type: none"> Reflects on personal values, behaviours and assumptions and considers how these might be perceived by others |

Unit Mapping Information

Supersedes and is equivalent to BSBCRT402 Collaborate in a creative process.

Supersedes but is not equivalent to BSBCRT403 Explore the history and social impact of creativity.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCRT413 Collaborate in creative processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- collaborate in a creative process on at least two occasions.

In the course of the above, the candidate must:

- contribute to a collaborative creative process in a way that generates, expands and develops ideas into a well-conceived solution
- develop an action plan with team according to task requirements
- evaluate and seek feedback on own role in the collaborative process
- identify and act on ways to enhance own ability to contribute effectively to a collaborative creative process.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legal framework that applies to the collaboration of creative process
- methodologies for creative idea generation and refinement
- features of trustworthy and ethical behaviour in the context of creative endeavours
- various roles individuals may play in a collaborative creative process and how these roles contribute to the overall effort
- strategies to develop teamwork in a collaborative creative process
- components of team action plan including:
 - task requirements
 - timelines
 - delegation of responsibilities
- techniques for maximising the potential for creativity in a team.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- a team of people in a collaborative creative process.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCRT511 Develop critical thinking in others

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop critical and creative thinking skills in others within a workplace context.

The unit applies to individuals who are developing and coaching others, for whom critical thinking skills (including analysis, synthesis, and evaluation) are an important part of their job roles. This unit applies to individuals who are typically responsible for leading teams.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Critical Thinking

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assess individual and team critical and creative thinking skills | 1.1 Research models of critical and creative thinking 1.2 Develop questions to identify individual and team knowledge gaps 1.3 Facilitate formal and informal learning opportunities for addressing identified gaps 1.4 Articulate key features of critical and creative thinking concepts to relevant personnel |
| 2. Establish an environment that encourages the application of critical | 2.1 Analyse current organisational systems to identify gaps or barriers to critical thinking 2.2 Develop processes that create a safe environment for critical and creative thinking approaches |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| and creative thinking | 2.3 Facilitate opportunities for team members to apply critical thinking skills to workplace problems 2.4 Provide feedback to team members on performance of tasks |
| 3. Monitor and improve thinking practices | 3.1 Collect and analyse feedback from individuals and teams on critical and creative thinking opportunities 3.2 Identify additional support required for teams and individuals 3.3 Develop recommendations for improvements in future learning arrangements according to relevant legislation and organisation policies |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Learning | <ul style="list-style-type: none"> Transfers skills and knowledge to a variety of team development contexts Evaluates own performance and outcomes of learning processes to identify opportunities for improvement |
| Oral communication | <ul style="list-style-type: none"> Identifies and articulates ideas and requirements clearly and persuasively using techniques appropriate to audience and environment Participates in a verbal exchange of ideas and elicits the views and opinions of others by listening and questioning |
| Reading | <ul style="list-style-type: none"> Researches, analyses and evaluates textual information, from a wide range of sources, to identify information relevant to systems that support critical thinking and learning |
| Writing | <ul style="list-style-type: none"> Develops complex strategies using language and format appropriate to the audience and purpose |
| Teamwork | <ul style="list-style-type: none"> Looks for ways of establishing connections and building genuine understanding with a diverse range of people Uses inclusive and collaborative techniques to negotiate, influence and elicit the views and opinions of a wide range of stakeholders |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies implications of legal and regulatory responsibilities on own work |

| Skill | Description |
|-------------------------|---|
| Planning and organising | <ul style="list-style-type: none">• Accepts responsibility for planning and implementing systems and strategies to achieve organisational goals, negotiating key aspects with others• Adheres to implicit and explicit organisational policies and procedures, seeking advice from others if necessary |

Unit Mapping Information

Supersedes and is equivalent to BSBCRT502 Develop critical thinking in others.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCRT511 Develop critical thinking in others

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop an environment for an organisation or work area that supports the application of critical and creative thinking methods.

In the course of the above, the candidate must:

- identify critical and creative thinking concepts and approaches, and their application to a workplace context
- facilitate relevant learning opportunities for others
- develop questions and prompt questioning to broaden knowledge and understanding of the team member cohort
- monitor team skill development to develop recommendations on future learning arrangements to be implemented in future planning.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- models of critical and creative thinking
- features of critical thinking concepts and approaches including analysis, synthesis, and evaluation
- existing workplace objectives, processes and resources
- characteristics of organisational learning environments and related learning systems
- legislative requirements relating to workplace procedures
- sources of reliable information relevant to workplace procedures
- features of industry best practice approach to instruction on critical and creative thinking methods
- leading a team and individuals to develop critical and creative thinking skills.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures required for role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCRT512 Originate and develop concepts

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to originate and develop concepts for products, programs, processes or services to an operational level.

The unit applies to individuals who develop concepts for any business or community activity or process. This may include marketing and advertising campaigns, staff development programs, information technology and communication systems, radio and television programs and entertainment events. These individuals operate with a high degree of autonomy and also collaborate with others to generate ideas and refine concepts for implementation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Critical Thinking

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Scope issue | 1.1 Select issue to be explored in consultation with relevant personnel 1.2 Assess possible solutions to business issue and identify restrictions according to job role and organisational policy 1.3 Research information on possible solutions to identified issue 1.4 Assess factors affecting viability of possible solutions |
| 2. Generate and present solutions | 2.1 Brainstorm ideas for addressing issue 2.2 Evaluate ideas against identified factors affecting viability 2.3 Compare ideas with best practice examples of similar products |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | or programs or processes or services 2.4 Select and present a solution in relevant format to stakeholders |
| 3. Refine solutions for implementation | 3.1 Seek feedback on ideas from stakeholders 3.2 Respond to questions with substantiated answers 3.3 Document feedback according to organisational requirements 3.4 Refine and finalise solution according to task requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Learning | <ul style="list-style-type: none"> Reflects and evaluates methods used to develop concepts and seeks ways to improve Actively elicits views and opinions of others to develop and refine ideas |
| Oral communication | <ul style="list-style-type: none"> Expresses thoughtful and challenging opinions using engaging language and non-verbal features Elicits views and information from others using a range of active listening and questioning techniques |
| Reading | <ul style="list-style-type: none"> Interprets and evaluates a range of complex information |
| Writing | <ul style="list-style-type: none"> Documents findings and ideas using language and structure to suit the purpose Prepares proposals and plans for relevant stakeholders incorporating appropriate vocabulary and grammatical structures |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and influencing direction Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information |
| Planning and organising | <ul style="list-style-type: none"> Uses systematic, analytical processes in complex, non-routine situations to gather and evaluate possible concepts, and select the most appropriate concept for development Monitors outcomes, considering results from a range of perspectives and identifying key concepts and principles that may be adaptable to future situations |

| Skill | Description |
|------------|---|
| Technology | <ul style="list-style-type: none">• Uses main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBCRT501 Originate and develop concepts.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCRT512 Originate and develop concepts

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, refine and implement a solution to address a workplace issue on at least one occasion.

In the course of the above, the candidate must:

- consult with stakeholders to identify workplace issue to be addressed within scope of job role and organisational policy
- generate potential ideas that provide innovative solutions to identified issues
- evaluate viability of ideas
- present ideas and information to others and reflect on responses
- refine chosen solution in response to feedback.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- creative thinking techniques to generate innovative solutions to issues
- existing products, programs, processes or services to address selected issue
- factors affecting viability of possible solutions including:
 - commercial potential
 - suitability for the target audience or purpose
 - feasibility of implementing solution
- issues and requirements to commercialise the concept
- practical and operational issues to be considered in specific work or community context
- practical and operational issues that determine whether a concept can be implemented
- techniques for generating creative ideas and solutions, and for translating them into workable concepts.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- background information required to evaluate the operational factors that will affect the implementation of concepts
- opportunities to collaborate with others throughout the concept development process.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBCRT611 Apply critical thinking for complex problem solving

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to apply critical thinking in order to develop solutions to complex issues arising in the workplace.

The unit applies to individuals who are required to think critically in order to develop structured and innovative solutions to overcome complex organisational issues. Individuals in these roles operate with a high degree of autonomy and may undertake non-standard work tasks involving escalated risks. These individuals are often responsible for a team or work area.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Critical Thinking

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Scope problem solving process | 1.1 Identify complex issue for resolution within scope of job role and in consultation with relevant stakeholders 1.2 Document task objectives and risks involved in pursuing identified issue 1.3 Research legislative frameworks and organisational policy or procedures applicable to identified issue 1.4 Calculate required resources and present to relevant stakeholders |
| 2. Lead solution | 2.1 Facilitate ideation session with relevant stakeholders |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|--|
| development process | 2.2 Evaluate formulated solutions for advantages and limitations using critical thinking techniques 2.3 Apply decision-making processes to select most viable solution 2.4 Prepare a brief on proposed solution according to organisational policy and present to key stakeholders |
| 3. Refine solution for implementation | 3.1 Develop a feedback register to systematically record feedback according to organisational requirements 3.2 Refine proposal based on analysis of feedback 3.3 Seek necessary approvals to implement solution |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Evaluates own performance to identify opportunities for improvement Makes a range of critical and non-critical decision in relatively complex situations, taking a range of constraints into account |
| Numeracy | <ul style="list-style-type: none"> Interprets, analyses and presents numeric and financial information to identify patterns and trends |
| Oral communication | <ul style="list-style-type: none"> Identifies and articulates ideas and requirements clearly and persuasively using techniques appropriate to audience and environment Participates in a verbal exchange of ideas and elicits the views and opinions of others by listening and questioning |
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses textual information when developing the proposal and monitoring operational performance |
| Writing | <ul style="list-style-type: none"> Communicates relationships between ideas and information, matching style of writing to purpose and audience |
| Planning and organising | <ul style="list-style-type: none"> Systematically gathers and analyses all relevant information and evaluates options in order to monitor performance and identify opportunities for improvement |
| Technology | <ul style="list-style-type: none"> Uses main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

No equivalent unit. New unit.

Supersedes but is not equivalent to BSBCRT601 Research and apply concepts and theories of creativity.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCRT611 Apply critical thinking for complex problem solving

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead the process for addressing at least one complex workplace issue up to the point of implementation.

In the course of the above, the candidate must:

- identify task objectives and risks involved with pursuing identified problem
- research legislative frameworks and applicable frameworks for identified problem
- calculate resources required for solution development process
- facilitate others in idea generation for possible solutions
- present proposed solution to key stakeholders
- use feedback to revise solution to achieve stakeholder approval
- seek necessary approvals for the implementation of the solution.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative frameworks and organisational policy or procedures applicable to identified workplace problem
- critical and creative thinking techniques applicable to performance evidence
- advantages and risks in the development of solutions for identified workplace problems
- decision-making processes including barriers to effective decision-making
- sources of relevant information to identified issue, including desk research and stakeholder consultations
- organisational requirements for development and presentation of a brief and feedback register
- approval process for workplace solution.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the customer service field of work and include access to:

- organisational policies and procedures
- opportunities to collaborate with others throughout the concept development process
- resources required to undertake research, prepare a brief and develop a feedback register.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBDAT201 Collect and record data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to collect and record data according to organisational policies and procedures.

The unit applies to individuals who perform a range of routine tasks, using limited practical skills and fundamental operational knowledge and who work under some supervision and guidance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to collect data | 1.1 Confirm task requirements 1.2 Identify source of data 1.3 Identify method of data collection and recording procedures according to organisational policies and procedures |
| 2. Collect data | 2.1 Access data at source 2.2 Use identified data collection methods according to task requirements 2.3 Action data source difficulties within scope of own role, or escalate to required personnel |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------|---|
| 3. Finalise data collection | <p>3.1 Record data in database according to organisational policies and procedures using safe work practices</p> <p>3.2 Identify and action issues encountered within scope of own role, or escalate to required personnel</p> <p>3.3 Record issues encountered according to organisational policies and procedures</p> <p>3.4 Check work against task requirements and amend database where required</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Interprets information from relevant sources |
| Writing | <ul style="list-style-type: none">Uses clear, specific and industry-related terminology to complete and update workplace documentation |
| Oral communication | <ul style="list-style-type: none">Uses appropriate tone, pace, and listening and questioning techniques to confirm understanding |
| Technology | <ul style="list-style-type: none">Uses specific functions and key features of common digital systems and tools and operates them effectively to complete data collection tasks |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBCUE204 Collect data.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBDAT201 Collect and record data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- collect and record data on at least two different occasions from at least two different sources.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key data-collection methods
- work health and safety risks that apply to data-collection methods
- organisational policies and procedures for collecting and recording data
- key features and functions of technology used to collect data
- data sources relevant to performance evidence
- code of conduct relevant to data-collection.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant organisational policies and procedures
- data sources
- a database
- personnel for escalation of potential source or database issues.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBDAT501 Analyse data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to analyse data from a range of sources and to report findings of that data analysis.

The unit applies to those typically in roles required to analyse data, communicate trends and make recommendations.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for data analysis | 1.1 Establish task requirements 1.2 Access source of reliable data according to task requirements and organisational policies and procedures 1.3 Evaluate reliability of data 1.4 Store data according to organisational policies and procedures |
| 2. Analyse dataset | 2.1 Select methods of data analysis according to task requirements and industry best practice 2.2 Categorise data for analysis 2.3 Analyse and synthesise data according to task requirements, organisational policies and procedures and industry best practice |
| 3. Finalise data analysis | 3.1 Conduct statistical analysis to confirm accuracy of data analysis |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| process | 3.2 Identify and remove incorrect results 3.3 Select outcomes that are relevant to purpose of analysis 3.4 Report on key outcomes 3.5 Store analytics results and report according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Researches, analyses and evaluates textual information, from a wide range of sources, to identify information relevant to data analysis |
| Oral communication | <ul style="list-style-type: none"> Uses a range of techniques to communicate complex concepts |
| Numeracy | <ul style="list-style-type: none"> Analyses and synthesises highly embedded mathematical information while analysing results |
| Teamwork | <ul style="list-style-type: none"> Actively identifies requirements of important communication exchanges, selecting appropriate channel, format, tone and content to suit purpose and audience |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequences stages of data analysis |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms and query languages and scripts to analyse data |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBCUE404 Collect, analyse and record information
- BSBCUE503 Manage data interrogation
- BSBITU501 Conduct data analysis.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBDAT501 Analyse data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- analyse and report on three datasets according to:
 - organisational policies and procedures
 - industry best practice
- develop report on key outcomes of analysis of datasets.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key details of datasets and techniques for synthesising data
- organisational policies and procedures relating to:
 - accessing information
 - recording and reporting outcomes of analysis
 - requirement for data analysis
- key features of industry standards and techniques relating to data analysis
- potential data sources and factors that impact on reliability of data, including timeliness, authority, audience, relevance and potential for bias
- importance and value of data analysis
- methods of data analysis
- statistical analysis
- key legislative requirements relating to data analysis
- methods of reporting analysis.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- technology, software and consumables required to analyse data
- organisational operational policies and procedures required for performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB301 Investigate business opportunities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify a business opportunity and its key components. This requires undertaking research to determine the viability of the opportunity, with reference to the legislative frameworks affecting the business.

The unit applies to those establishing or operating a business providing self-employment, as well as those establishing a new venture as part of a larger organisation. The business opportunities may relate to products and/or services offered by the business.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify potential opportunities for business | 1.1 Source and analyse market information for potential opportunities 1.2 Analyse information and list details of business ideas and opportunities 1.3 Identify and describe products and/or services that match business ideas 1.4 Identify and analyse available business, financial, digital technology and technical factors related to the potential opportunities 1.5 Identify customers for the products and/or services |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2. Investigate market needs and factors affecting market | 2.1 Collect, investigate and analyse business and market information, trends and developments from primary and secondary sources to identify market needs related to business opportunities 2.2 Identify ethical and cultural requirements of the market 2.3 Identify projected changes in population, economic activity and other macro external factors that may impact business opportunities 2.4 Review identified needs and factors and identify their potential impact on business opportunities 2.5 Investigate marketing and promotion activities and strategies for identified products and/or services |
| 3. Finalise investigation into business opportunities | 3.1 Review personal factors against business opportunities and identify their impact on opportunities 3.2 Examine options to address and minimise negative impact and strengthen positive impact of personal factors 3.3 Document outcomes of investigation into business opportunity |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|------------|--|
| Reading | <ul style="list-style-type: none"> Analyses and evaluates information and integrates facts and ideas |
| Writing | <ul style="list-style-type: none"> Uses information and industry-related terminology to develop required documentation |
| Numeracy | <ul style="list-style-type: none"> Extracts, evaluates and compares numerical information to determine resources and identify trends |
| Technology | <ul style="list-style-type: none"> Uses a range of digitally based technology and applications to access and filter data, and then extract, organise and integrate relevant information |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBSMB201 Identify suitability for micro business

- BSBSMB301 Investigate micro business opportunities
- BSBSMB306 Plan a home based business.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB301 Investigate business opportunities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify and investigate at least one business opportunity and assess the probability of success.

In the course of the above, the candidate must:

- research and analyse information from a range of sources for its potential impact on the market, products and/or services, and customers
- match personal factors to business opportunities.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- sources of business and market information on business ideas and potential business opportunities, including:
 - potential clients and past leads
 - competitor activities, products and services
 - industry trends and insights
 - legislative and regulatory requirements relevant to opportunities being investigated
- market information, trends and developments, including:
 - new and emerging markets and their features
 - expected market growth or decline and associated risk factors
 - economic activity, including projected or potential movements in prices
 - projected changes in availability of resources
- personal factors involved in choosing preferred opportunity include:
 - own skills and aspirations
 - own commitments, expectations and capabilities

- criteria for determining the viability of a business opportunity, including:
 - market size, potential, needs and trends
 - financial considerations
 - benefits and challenges of digital technologies relevant to opportunities
 - resource availability
- business research methods and data collection tools and software
- impact of ethical and cultural requirements of market on opportunities and products.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- internet access for research
- source of information on potential business opportunities, including customer or supplier information
- data collection tools and software
- legislative and regulatory information relating to business opportunities
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB302 Develop and present business proposals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to research the viability of ideas for business opportunities and develop and present proposals for viable options in formats suiting a range of stakeholders.

The unit applies to those establishing or operating a business providing self-employment, as well as those establishing a new venture as part of a larger organisation. The proposals may relate to products and/or services offered by the business.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate business ideas | 1.1 Identify ideas relating to business opportunities 1.2 Research key factors influencing their financial viability 1.3 Analyse business ideas to determine viability of business opportunity 1.4 Record outcomes of evaluation according to workplace procedures |
| 2. Manage risk associated with business proposal | 2.1 Identify potential risks associated with opportunity ideas and viability of business 2.2 Communicate with relevant stakeholders the potential risks 2.3 Assist relevant stakeholders to develop risk management |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | systems |
| 3. Develop proposal for viable business idea | 3.1 Identify audience for proposal, and required structure and content 3.2 Establish budget according to financial viability 3.3 Develop description of business idea according to identified budget and business opportunities 3.4 Confirm that draft proposal meets requirements |
| 4. Present business proposal | 4.1 Determine presentation method suited to audience 4.2 Provide customised business proposal to target audience 4.3 Seek feedback to inform future proposals |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets information from a range of sources |
| Writing | <ul style="list-style-type: none"> Uses information and industry-related terminology to complete required documentation |
| Numeracy | <ul style="list-style-type: none"> Extracts, evaluates and compares numerical information |
| Initiative and enterprise skills | <ul style="list-style-type: none"> Plans and implements tasks required to prepare and present a business proposal Analyses and evaluates options before making decisions, considering needs, resources and constraints |
| Technology | <ul style="list-style-type: none"> Uses a range of digital tools to access, organise, integrate and present relevant information |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB302 Develop a micro business proposal.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB302 Develop and present business proposals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and present a business proposal for a product or service.

In the course of the above, the candidate must:

- analyse information from a range of sources to evaluate the viability of the business opportunities, including:
 - consideration of personal commitments
 - risk identification and assessment
 - personal skills and attributes analysis against required skills
 - anticipated financial returns.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- factors influencing financial viability of business ventures, including financial returns
- factors influencing viability of business ideas, including:
 - impact of emerging or changing technology
 - personal circumstances and suitability of own skills profile
 - assessed risks
 - availability of required resources
- key requirements for business proposals, including:
 - information relating to legislative requirements, regulations, standards and codes or practice
 - structure and content suited to audience needs
 - formats and methods of presentations
 - description of products and/or services

- workplace procedures for:
 - recording outcomes of proposal evaluation
 - establishing income and expenditure costing for business proposal
- principles of risk assessment relevant to business opportunity described in performance evidence.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business technology, including internet access and presentation software
- legislation, regulations, standards and codes of practice relating to business proposal described in performance evidence
- workplace documentation and resources relevant to performance evidence
- interaction with others for presentation purposes.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB303 Organise finances for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to estimate start-up costs, financial viability and projected cash flow and budget for a new business venture. It involves assessing the need to access required finances based on calculations and estimates undertaken.

The unit applies to those establishing a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to organise finances for new business venture | 1.1 Establish current financial situation, showing funds available and commitments already incurred 1.2 Identify equity finance and assets from available sources 1.3 Identify business mix and forecast expected business activity over a year |
| 2. Determine required finances for new business venture | 2.1 Estimate start-up costs for business venture according to established business activities 2.2 Estimate income and expenses for first year of operation 2.3 Project cash flow for first year of operation 2.4 Seek specialist financial advice as required according to |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | workplace procedures 2.5 Record cash flow and budget and required finances |
| 3. Plan to access finances for new business venture | 3.1 Investigate and source suitable types of finances 3.2 Establish methods of accessing finances and servicing any repayment schedule 3.3 Complete required documentation |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses a variety of textual information from a range of sources and identifies relevant and key information |
| Writing | <ul style="list-style-type: none"> Uses information and industry-related terminology to complete required workplace documentation |
| Oral Communication | <ul style="list-style-type: none"> Uses listening and questioning techniques to seek information and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Analyses numerical information to complete required calculations and estimates |
| Initiative and enterprise | <ul style="list-style-type: none"> Seeks input and expert advice when decisions involve unfamiliar issues Determines priorities and sequences steps involved in clearly defined familiar tasks, and identifies and assembles resources required |
| Technology | <ul style="list-style-type: none"> Uses main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB303 Organise finances for the micro business.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB303 Organise finances for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- organise finances for at least one new business venture.

In the course of the above, the candidate must:

- investigate financial position, commitments and needs
- determine projected cash flow and budget for business venture
- estimate finances needed to establish and operate the business venture.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- sources of specialist financial advice relating to new business ventures, including Australian Taxation office (ATO)
- accounting software for use in the business venture described in performance evidence
- key financial terminology relevant to new business ventures
- relationship between finances and sales and marketing strategies
- workplace procedures for:
 - costing or pricing and preparing financial forecasts
 - estimating start-up costs, including cost of expenses and assets
 - seeking specialist financial advice
- income and costs to be considered when estimating operating budget, including:
 - monthly variable and fixed costs required for business activity
 - drawings needed for business venture to be financially viable
 - monthly income generated by business venture based on price per unit item or hourly charge rate for labour
 - goods and services tax

- operating finance required for business.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business technology, including internet access
- finance documentation and resources relating to business described in performance evidence
- sources of specialist advice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB304 Determine resource requirements for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify resources required for new business ventures; select options for acquiring them; and develop procedures and systems for introducing, using and maintaining them.

The unit applies to those establishing a business providing self-employment, as well as those establishing a new venture as part of a larger organisation. Resources may include business machinery, equipment and software.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish resource requirements of new business venture | 1.1 Analyse business profile and consult with required personnel to determine business requirements for resources 1.2 Analyse factors impacting type and quantity of required resources 1.3 Record proposed type and quantity of required resources |
| 2. Source resources required in new business venture | 2.1 Research options for acquiring resources that meet business outcomes 2.2 Evaluate identified options to determine reliability, risk, cost, and ease of access to service and support |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 2.3 Engage with suppliers and other key people to negotiate supply of resources according to established workplace activities 2.4 Select and document resources to be acquired and seek approval. |
| 3. Prepare for use of selected resources in new business venture | 3.1 Obtain or design procedures and systems for effective and efficient introduction and use of selected resources 3.2 Ensure procedures are in place to monitor resource use and maintain, repair and replace resources |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none">Gathers, interprets and analyses textual and numerical information from a range of sources and identifies key information |
| Writing | <ul style="list-style-type: none">Uses information and industry-related terminology to complete simple instructional documentation |
| Oral communication | <ul style="list-style-type: none">Uses relevant language suitable to audience to convey requirements, and listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none">Analyses numerical information to calculate resource and equipment expenditure |
| Initiative and enterprise | <ul style="list-style-type: none">Researches new ideas and opportunities, selecting appropriate options as required |
| Technology | <ul style="list-style-type: none">Uses a range of digitally based technology and applications to access and filter data, and then extract, organise, integrate and share information |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB304 Determine resource requirements for the micro business.

Supersedes but is not equivalent to:

- BSBSMB307 Set up information and communications technology for the micro business
- BSBSMB308 Improve energy efficiency in micro or small business operations.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB304 Determine resource requirements for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- select at least two different types of resources for a new business venture, one of which must relate to digital technologies.

In the course of the above, the candidate must:

- select resources that suit the business venture profile
- calculate required resource levels in line with business profile and projected business activity
- select options for resource acquisition suited to business venture, including financial position and stakeholder needs
- ensure procedures and systems are in place in relation to selected resources.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- business requirements relating to required resources, including legislative and regulatory
- business venture profile and structure
- factors impacting type of resources required, including:
 - benefits and challenges of specific resources
 - functions of required digital technologies, business equipment and machinery
 - warranties and conditions of use
- factors impacting quantity of resources required, including:
 - business profile
 - projected business activity levels
 - business financial position
- workplace procedures and systems for:

- selecting and documenting resources to be acquired
- seeking approval for resource acquisition
- engaging with potential and existing suppliers
- negotiating arrangements for supply of resources
- using and maintaining resources.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business equipment and resources, including maintenance manuals
- business technology, including internet access
- workplace documentation and resources relevant to performance evidence, including a sample business profile.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB305 Address compliance requirements for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to source advice and specialist services to assist in addressing business compliance relating to regulatory, taxation and insurance requirements.

The unit applies to those establishing a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Research compliance requirements of new business venture | 1.1 Identify regulatory, taxation and insurance requirements relevant to new business venture 1.2 Access information that assists in interpreting and explaining identified compliance requirements 1.3 Research relationships between legislation, regulations, codes of practice, associated standards and accessed information to determine compliance requirements of the business venture |
| 2. Seek specialist advice on compliance and risk minimisation | 2.1 Identify sources of specialist advice and services relevant to identified compliance requirements and business venture profile 2.2 Select and access identified specialist advice and services |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>according to business needs, available resources, and workplace procedures</p> <p>2.3 Clarify and confirm compliance requirements and their appropriateness for business, and risk minimisation needs with advisors</p> <p>2.4 Review and document advice and procedures</p> |
| 3. Take action to support business compliance | <p>3.1 Arrange insurance cover for the business according to business needs, available resources, and workplace procedures</p> <p>3.2 Implement compliance procedures according to specialist advice received</p> <p>3.3 Seek feedback on implemented compliance procedures from required personnel</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets legislative and regulatory information relevant to business requirements |
| Oral communication | <ul style="list-style-type: none"> Articulates clearly using specific and relevant language suitable to audience to convey requirements, and listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Analyses numerical information to calculate specific business requirements Uses formal and informal mathematical language to discuss compliance |
| Self-management | <ul style="list-style-type: none"> Takes some personal responsibility for ensuring business compliance with legal and regulatory requirements |
| Planning and organising | <ul style="list-style-type: none"> Plans routine tasks with goals and outcomes, taking some responsibility for decisions regarding sequencing and timing Determines priorities and sequences steps involved in clearly defined tasks, and identifies and assembles resources required |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB305 Comply with regulatory, taxation and insurance requirements for the micro business.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB305 Address compliance requirements for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement procedures to address at least two different compliance requirements for a business or new business venture.

In the course of the above, the candidate must:

- identify, select and access sources of advice on compliance and risk minimisation procedures
- identify regulatory, taxation and insurance compliance requirements, and risk minimisation needs.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- regulatory, taxation and insurance compliance information, and specialist advice and services in relation to operation of new business ventures, including:
 - industry codes of practice and standards
 - registration and licensing
 - work health and safety (WHS) requirements and responsibilities
 - required insurances
- workplace procedures that support compliance of new business venture, including for:
 - selecting and accessing specialist advice and services
 - arranging business insurance cover
- key components of compliance procedures:
 - following taxation and industrial relations principles
 - updating and maintaining legal documents
 - investigating areas of non-compliance

- monitoring provision of products and/or services
- taking corrective action where necessary.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business technology, including internet access for research
- legislation, regulations, codes of practice and standards relating to compliance requirements described in performance evidence
- workplace procedures and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB401 Research and develop business plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to research and develop business plans for achieving business goals and objectives.

The unit applies to those establishing or operating a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to develop business plan | 1.1 Identify purpose and required components of business plan 1.2 Identify and document business goals, objectives and budget 1.3 Research market needs and estimate market size |
| 2. Draft business plan | 2.1 Establish resource, legal and compliance requirements according to identified business goals and objectives 2.2 Assess product mix, volumes and pricing opportunities relevant to the identified target market and according to business goals and objectives 2.3 Plan marketing activities relevant to the product mix and according to marketing objectives and strategies and budgetary requirements 2.4 Develop draft plan according to identified business goals, |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>objectives and market needs</p> <p>2.5 Analyse draft plan and identify, assess and prioritise internal and external risks according to workplace procedures</p> <p>2.6 Research specialist services and sources of advice and cost according to available resources</p> |
| 3. Create a business plan | <p>3.1 Identify costs associated with production and delivery of business products and/or services</p> <p>3.2 Calculate prices based on costs and profit targets, as a charge-out rate for labour or unit price for products and/or services</p> <p>3.3 Prepare cash flow projections to enable business operation according to business plan and legal requirements</p> <p>3.4 Select budget targets to enable ongoing monitoring of financial performance</p> <p>3.5 Identify sources of finance for required liquidity according to business goals and objectives and workplace procedures</p> |
| 4. Finalise business planning and plan for risk | <p>4.1 Develop risk management strategies according to business goals and objectives, and legal and compliance requirements, and established business activities</p> <p>4.2 Assess likelihood of non-conformance with each component of business plan</p> <p>4.3 Develop a contingency plan to address possible areas of non-conformance according to workplace procedures</p> <p>4.4 Identify specific interests and objectives of key stakeholders and confirm their support of planning outcomes</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-----------------|---|
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates information during planning process |
| Writing | <ul style="list-style-type: none"> Prepares written documentation that communicates plan information clearly and effectively |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical information to determine prospective markets, resource allocations and business profits/losses |
| Self-management | <ul style="list-style-type: none"> Identifies implications of legal and compliance requirements related to own work |

| Skill | Description |
|-------------------------|---|
| | <ul style="list-style-type: none">Makes a range of critical and non-critical decisions, taking a range of constraints into account |
| Planning and organising | <ul style="list-style-type: none">Uses a combination of formal, logical planning processes to identify relevant information and to evaluate alternative strategies or methods |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB404 Undertake small business planning.

Supersedes but is not equivalent to:

- BSBSMB415 Refine and strengthen a small business
- BSBSMB422 Plan small business growth.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB401 Research and develop business plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least one business plan that addresses the goals and objectives of a business or business venture.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legal and compliance requirements relating to business operation to be included in plan, including:
 - environmental
 - work health and safety (WHS), including WHS responsibilities and procedures for identifying hazards relating to business profile
 - equal opportunity
 - industrial relations
- types of business planning, including:
 - feasibility studies
 - strategic, operational, financial and marketing planning
- factors affecting structure of business plan, including:
 - purpose of plan
 - target audience
 - desired outcomes
- key components of business plan, including:
 - sources and costs of finance to provide required liquidity and profitability for business
 - marketing strategies and methods to promote market exposure of business
 - methods or means of production or operation required for business

- staffing requirements to effectively produce or deliver products and services
- contingency plan
- methodology for researching and preparing a business plan
- common business risks and risk management strategies
- workplace procedures for:
 - assessing and prioritising internal and external risks to business
 - establishing resource requirements aligned to business goals and objectives, including for calculating staffing requirements to produce or deliver products and/or services
 - developing a business contingency plan for unexpected events and situations
 - developing risk management strategies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relating to business described in performance evidence
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB402 Establish legal and risk management requirements of new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify and comply with legal and risk management requirements of the business or new business venture, including negotiating, creating and planning for legal contracts used within the business, where required.

The unit applies to those establishing a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify legal and risk management requirements relating to business | 1.1 Identify legal structure of business using reliable sources 1.2 Identify legislative and regulatory requirements applicable to identified legal structure 1.3 Analyse identified requirements and their relationship to business and workplace practices and processes |
| 2. Implement procedures and processes to comply with legislative and regulatory | 2.1 Develop and implement procedures to ensure compliance with relevant legislative and regulatory requirements 2.2 Develop and implement processes and procedures for storing and maintaining legal documents and business records 2.3 Establish systems to identify areas of non-compliance and take |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|---|
| requirements | corrective action where necessary |
| 3. Negotiate and arrange contracts | <p>3.1 Assess products and/or services to determine procurement rights and ensure protection of business interests</p> <p>3.2 Negotiate and secure contractual procurement rights for goods and/or services as required and according to business plan and workplace procedures</p> <p>3.3 Complete any contractual arrangements according to workplace procedures and business plan</p> <p>3.4 Seek legal advice if required to confirm contractual rights and obligations</p> |
| 4. Mitigate business risks | <p>4.1 Analyse business activities and identify applicable risk management requirements</p> <p>4.2 Assess probability and impact of identified internal and external risks to business</p> <p>4.3 Develop a plan to prioritise and treat risks</p> <p>4.4 Implement procedures to mitigate risks according to risk treatment plan</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Accesses information to maintain up-to-date information on legal and risk management requirements |
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates a range of complex text to determine legislative, regulatory and related business requirements |
| Writing | <ul style="list-style-type: none"> Prepares written plans and workplace documentation that communicate information clearly and effectively |
| Oral communication | <ul style="list-style-type: none"> Uses specific and relevant language to clearly articulate legal issues, and uses questioning and listening techniques to clarify solutions Participates in verbal negotiations using tone and language suitable to audience |
| Numeracy | <ul style="list-style-type: none"> Reviews, analyses and contrasts numerical data which may be embedded in documents |
| Self-management | <ul style="list-style-type: none"> Monitors adherence to workplace procedures and legislative requirements |
| Planning and | <ul style="list-style-type: none"> Implements actions as per plans and makes adjustments if necessary |

| Skill | Description |
|------------|----------------------------------|
| organising | and addressing unexpected issues |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB401 Establish legal and risk management requirements of small business.

Supersedes but is not equivalent to:

- BSBIPR405 Protect and use intangible assets in small business
- BSBSMB410 Review and implement energy efficiency in business operations.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB402 Establish legal and risk management requirements of new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- establish legal and risk management requirements for at least one business or new business venture, and implement procedures for meeting them
- create at least one contract with a supplier of goods or services to business or new business venture
- identify, assess and treat at least three different risks specific to business or new business venture and prioritise risks with highest probability of occurrence and greatest negative impact.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory requirements relating to operation of new business ventures, including:
 - consumer legislation
 - environmental requirements and responsibilities
 - registration and licensing
 - industry codes of practice and standards
 - work health and safety (WHS) requirements and responsibilities
 - insurance products and requirements, including adequate coverage
- workplace procedures for:
 - negotiating, creating and terminating contractual arrangements, including seeking legal advice
 - investigating and securing procurement rights relating to products and/or services
 - identifying options for leasing or owning business premises
- legal rights and obligations of alternative ownership structures

- key features of workplace record-keeping processes and procedures that:
 - meet minimum legal and taxation requirements
 - maintain records in a secure and accessible manner
- key components of compliance procedures:
 - following taxation and industrial relations principles and requirements
 - updating and maintaining legal documents
 - investigating areas of non-compliance
 - monitoring provision of products and/or services
 - taking corrective action where necessary
- key steps in risk management process, including procedures for developing and implementing business risk treatment plan.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business technology, including internet access
- legislation, regulations, codes of practice and standards relating to business described in performance evidence
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB403 Plan finances for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify financial requirements of a business, including profit targets, cash flow projections and strategies to garner financial support.

The unit applies to those establishing a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to plan finances | <ul style="list-style-type: none">1.1 Identify costs associated with production and delivery of business products and/or services1.2 Set profit targets according to business venture requirements and workplace procedures1.3 Calculate prices based on costs and profit targets, as a charge-out rate for labour or unit price for products and/or services1.4 Calculate break-even sales point to assess viability of business venture1.5 Evaluate and select pricing strategies in relation to market conditions to meet profit targets and according to workplace |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------|--|
| | procedures 1.6 Prepare projected profit statement to supplement business plan |
| 2. Develop a financial plan | 2.1 Identify working capital requirements necessary to attain profit projections 2.2 Identify non-current asset requirements and consider alternative asset management strategies 2.3 Prepare cash flow projections to enable business operation according to business plan and legal requirements 2.4 Identify capital investment requirements accurately for each operational period 2.5 Select budget targets to enable ongoing monitoring of financial performance |
| 3. Plan to acquire finance | 3.1 Identify start-up and ongoing financial requirements according to financial plan and budget 3.2 Identify sources of finance for required liquidity according to business goals and objectives and workplace procedures 3.3 Research and assess cost of securing finance on optimal terms 3.4 Develop strategies to obtain finance as required to ensure financial viability of business venture |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-----------------|--|
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates complex information from a range of sources |
| Writing | <ul style="list-style-type: none"> Prepares written plans and workplace documentation that communicate information clearly and effectively |
| Numeracy | <ul style="list-style-type: none"> Analyses numerical information to determine costs, prices, profit and losses, and other financial data |
| Self-management | <ul style="list-style-type: none"> Identifies implications of legal and regulatory responsibilities for own work Takes a range of constraints into account and adjusts, if necessary |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB402 Plan small business finances.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB403 Plan finances for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least one financial plan that addresses financial requirements of a business or new business venture, including cash flow projections and a projected profit statement.

In the course of the above, the candidate must demonstrate that the plan:

- reflects legal requirements applicable to business
- includes strategies to monitor financial performance of business.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory requirements relating to business described in performance evidence
- process for conducting break-even analyses
- workplace procedures for:
 - costing for the business, including margin or mark-up, charge-out rates and unit costs
 - setting profit targets
 - identifying sources and investigating costs of securing appropriate financial assistance
- methods and relative costs of obtaining finance
- principles and procedures for preparing:
 - balance sheets
 - cash flow forecasts
 - profit and loss statements
 - financial plans
- purpose of financial reports
- accounting terminology required when planning finances for new business ventures

- methods for analysing working capital cycles.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- software for financial calculations
- legislation and regulations relating to business described in performance evidence
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB404 Market new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and implement a marketing strategy that is integrated into the business plan in order to improve the performance of a business venture. It involves analysing and interpreting market data.

The unit applies to those establishing a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop marketing strategy for business venture | 1.1 Identify focus of marketing activities according to business plan objectives and products and/or services being provided 1.2 Establish marketing objectives in consultation with required people and according to business plan and workplace procedures 1.3 Identify customer base, target market and competitors according to identified marketing objectives 1.4 Establish and evaluate strategy to ensure ethical and cultural appropriateness and alignment with customer and industry expectations |
| 2. Establish marketing | 2.1 Assess product mix, volumes and pricing opportunities |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|--|
| mix for the business venture | <p>according to marketing focus and business plan objectives</p> <p>2.2 Research and evaluate costs and benefits of available distribution channels and customer service strategies</p> <p>2.3 Select marketing and promotional activities to suit target market and according to marketing strategies</p> <p>2.4 Analyse customer journey to evaluate marketing mix</p> |
| 3. Implement marketing strategy | <p>3.1 Plan marketing activities according to marketing objectives and strategy and budgetary requirements</p> <p>3.2 Communicate roles and responsibilities to required people according to marketing plan and workplace procedures</p> <p>3.3 Monitor implementation of marketing activities according to marketing plan</p> <p>3.4 Assess use of digital devices, platforms and technologies for effectiveness in implementing marketing activities</p> |
| 4. Evaluate marketing performance | <p>4.1 Assess business performance according to business plan objectives</p> <p>4.2 Develop a plan to address performance gaps</p> <p>4.3 Analyse stakeholder response to all aspects of marketing mix to improve targeting and outcomes</p> <p>4.4 Assess changes in customer requirements in both online and offline environments, where applicable, and identify opportunities for improvement</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates complex information from a range of sources |
| Writing | <ul style="list-style-type: none"> Prepares plans and other workplace documentation using structure, layout and terminology appropriate to audience |
| Oral communication | <ul style="list-style-type: none"> Presents ideas and requirements clearly and using language and non-verbal techniques appropriate to audience and environment Uses questioning and listening to check and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Analyses numerical information to determine budgetary requirements and product quantities Uses a range of calculation methods to evaluate costs and benefits |

| Skill | Description |
|---------------------------|---|
| Initiative and enterprise | <ul style="list-style-type: none">• Reviews current situation and develops strategies to address improvements in marketing performance• Implements actions as per plan, making slight adjustments if necessary and addressing some unexpected issues• Uses formal and informal processes to monitor implementation of solutions |
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB403 Market the small business.

Supersedes but is not equivalent to BSBSMB409 Build and maintain relationships with small business stakeholders.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB404 Market new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement a marketing strategy for a business or new business venture, addressing activities in the digital environment.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- workplace processes and procedures for:
 - developing marketing objectives and marketing mix
 - identifying industry market trends relating to marketing new business ventures
 - communicating roles and responsibilities in marketing strategies to those involved
- key features of a marketing mix that addresses market and business venture needs and:
 - optimises sales and profit
 - evaluates costs and benefits
 - determines customer needs and promotional activities
- ethically and culturally appropriate practices relating to marketing new business ventures
- performance evaluation methods relating to marketing strategies
- methods of:
 - analysing costs and benefits of marketing strategies
 - monitoring customer satisfaction
 - conducting market analysis and research
- key features of current digital devices, platforms and technologies that achieve marketing objectives by engaging, responding to and monitoring customers.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business technology, including software for analysis of data
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB405 Manage compliance for small businesses

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and implement strategies for managing compliance obligations for small businesses. The unit requires broad knowledge of regulatory and legislative requirements used when developing these strategies.

The unit applies to those establishing or operating a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine compliance obligations | 1.1 Research internal and external compliance requirements and relevant Australian and international standards 1.2 Research codes of practice and material that interprets obligations and legislative requirements 1.3 Apply research information to determine relevance to business operations, products and services 1.4 Document compliance requirements, risks and consequences of possible breaches applicable to own business |
| 2. Develop strategies to manage compliance requirements | 2.1 Draft compliance management framework, prioritising areas where breaches have critical implications for the business 2.2 Validate draft compliance management framework using |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>external expertise and/or sources of advice according to workplace procedures</p> <p>2.3 Allocate responsibilities for compliance functions according to compliance management framework and workplace procedures</p> |
| 3. Implement and monitor compliance management strategies | <p>3.1 Select interval between cyclical compliance checks according to compliance management framework</p> <p>3.2 Communicate compliance requirements to required people</p> <p>3.3 Record timing and outcomes of compliance checks according to business requirements and workplace procedures</p> <p>3.4 Take action to address non-compliances according to compliance management framework and confirm that non-compliances have been resolved</p> |
| 4. Conduct improvement in compliance management | <p>4.1 Review outcomes of compliance checks to identify operational problems</p> <p>4.2 Analyse non-compliances to determine modifications required</p> <p>4.3 Update compliance management strategies based on information analysed</p> <p>4.4 Communicate changes in compliance management strategies to relevant people</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates information to determine legislative and regulatory requirements, trends and outcomes |
| Writing | <ul style="list-style-type: none"> Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience |
| Oral communication | <ul style="list-style-type: none"> Presents information and seeks advice using language appropriate to audience Participates in discussions using listening and questioning to elicit advice and to clarify or confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Calculates numerical information relating to compliance obligations |

| Skill | Description |
|-------------------------|---|
| Self-management | <ul style="list-style-type: none">• Develops, monitors and modifies workplace procedures according to legislative requirements and organisational goals• Selects and uses appropriate conventions and protocols when seeking and/or sharing information• Uses systematic, analytical processes in setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria |
| Planning and organising | <ul style="list-style-type: none">• Plans, organises and implements work activities of self and others that ensure compliance with organisational policies and procedures, and legislative requirements |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB418 Manage compliance for small business.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB405 Manage compliance for small businesses

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, implement, and monitor the effectiveness of strategies for managing at least three different compliance requirements for a small business.

In the course of the above, the candidate must:

- analyse small business operations to identify compliance requirements and their implications for the business
- develop compliance strategies that address regulatory and legislative requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- Australian and international standards, legislation, regulations, industry and organisational codes of practice specific to small business described in performance evidence
- external professional, industry based and government sources of advice and expertise
- key features of compliance management strategies relevant to small business
- methods for carrying out compliance checks and developing compliance strategies
- key components of compliance management frameworks
- workplace procedures for
 - accessing external expertise and advice
 - validating compliance management framework
 - allocating responsibilities for compliance functions within business
 - recording timing and outcomes of compliance checks.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- Australian and international standards, laws, regulations, industry and organisational codes and standards relating to business described in performance evidence
- business technology
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB406 Establish operational strategies and procedures for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and implement operational strategies and procedures for new businesses.

The unit applies to those establishing a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review operational strategies and procedures for business or new business venture | 1.1 Develop a detailed operational plan that sets out clear action points to fulfil on business goals and objectives 1.2 Identify work health and safety (WHS) and environmental issues and implement strategies to minimise risk factors 1.3 Review and evaluate, where appropriate, a quality assurance process for the business in line with industry standards, compliance requirements and cultural criteria 1.4 Develop operational key performance indicators (KPIs) that align to business plan 1.5 Align KPIs to business strategies, including utilisation of existing or new technologies, where practicable, to optimise |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | business performance |
| 2. Implement developed operational strategies and procedures | <p>2.1 Implement systems to evaluate business performance and customer satisfaction, including by setting KPIs or targets</p> <p>2.2 Implement systems to control stock, expenditure or cost, wastage or shrinkage and risks to health and safety according to business plan, incorporating new digital technologies where applicable</p> <p>2.3 Identify and manage staffing requirements, considering a range of permanent and flexible arrangements, and adhering to budgetary constraints</p> <p>2.4 Provide products and/or services according to established legal, ethical cultural and technical standards</p> <p>2.5 Provide products and/or services according to time, cost and quality specifications, and customer requirements, incorporating new digital technologies where applicable</p> <p>2.6 Apply quality procedures to address product and/or service and customer requirements</p> |
| 3. Evaluate business performance | <p>3.1 Use digital technologies to regularly evaluate and review achievement of operational targets to ensure optimum business performance, according to business goals and objectives</p> <p>3.2 Review and document systems and structures to support business performance</p> <p>3.3 Investigate and analyse operating problems to establish causes and implement changes as required, as part of business quality system</p> <p>3.4 Update operational policies and procedures to incorporate corrective action</p> |
| 4. Review business operations | <p>4.1 Review and adjust business operations to increase business success, according to business goals and objectives</p> <p>4.2 Research and implement new and emerging digital technologies into business operations according to business goals and objectives and workplace procedures</p> <p>4.3 Research new business opportunities and adjust business goals and objectives as new opportunities arise</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none">Evaluates complex text to determine legislative, regulatory and workplace documentation |
| Writing | <ul style="list-style-type: none">Prepares written reports and workplace documentation that communicate information clearly and effectively |
| Numeracy | <ul style="list-style-type: none">Interprets numerical information to manage performance information and regulate cash flow |
| Self-management | <ul style="list-style-type: none">Evaluates adherence to workplace policies and procedures and considers own role for its contribution to broader goals of work environmentIdentifies implications of legal and regulatory responsibilities for own work, with specific reference to safetyIdentifies concepts, principles and features of approaches in use in other contexts and applies them to own situation |
| Planning and organising | <ul style="list-style-type: none">Develops plans to manage relatively complex, non-routine tasks that may contribute to longer-term operational and strategic goals |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB420 Evaluate and develop small business operations.

Supersedes but is not equivalent to:

- BSBFRA401 Manage compliance with franchisee obligations and legislative requirements
- BSBFRA402 Establish a franchise
- BSBFRA403 Manage relationship with franchisor
- BSBFRA404 Manage a multiple-site franchise
- BSBFRA501 Establish a franchise operation
- BSBFRA502 Manage a franchise operation
- BSBFRA503 Manage establishment of new sites or regions
- BSBFRA504 Manage relationships with franchisees
- BSBFRA505 Manage closure of a franchise
- BSBIPR501 Manage intellectual property to protect and grow business
- BSBSMB423 Create a digital technology plan for small business.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB406 Establish operational strategies and procedures for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop strategies and procedures to manage operations for at least one new business or new business venture, including:
 - an operational plan
 - risk management procedures
 - a quality assurance process
 - performance measures.

In the course of the above, the candidate must:

- use existing, new and emerging digital technologies to optimise business performance
- research and record business improvements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, regulations, industry codes of practice and standards specific to small business described in performance evidence
- key features of methods for implementing operation and revenue control systems, including for controlling stock and expenditure
- methods for evaluating performance and implementing improvements, including:
 - identifying and meeting staffing requirements
 - analysing and correcting business problems
 - reviewing and adjusting the business plan
- work health and safety (WHS) responsibilities and procedures for managing hazards and assessing risks associated with business described in performance evidence
- principles of risk management, including risk assessment

- quality assurance system principles and methods
- role of digital technologies and innovation in modern business
- key features of systems to manage staff, stock, expenditure, services and customer service
- key features of required technical or specialist skills relevant to business operations
- workplace procedures for implementing new and emerging digital technologies into business operations.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business equipment and resources, including business technology
- legislation, regulations, codes of practice and standards relating to business described in performance evidence
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBESB407 Manage finances for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to implement and review financial management strategies, including by using new and emerging digital technologies and interpreting financial reports and other numerical data.

The unit applies to those establishing a business providing self-employment, as well as those establishing a new venture as part of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Entrepreneurship and Small Business

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Implement financial strategy | <ul style="list-style-type: none">1.1 Identify financial information requirements and obtain specialist services, as required1.2 Produce financial budgets or projections for each forward period, and distribute to required people according to legal requirements and workplace procedures1.3 Develop a plan to negotiate and manage business capital to best enable implementation of the business plan1.4 Develop and maintain strategies and enable adequate financial provision for taxation according to legal requirements1.5 Develop, monitor and maintain client credit policies to maximise cash flow |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|--|
| | 1.6 Select key performance indicators (KPIs) to enable ongoing monitoring of financial performance in line with business plan 1.7 Record and communicate financial procedures to required personnel to facilitate implementation of business plan according to workplace procedures |
| 2. Monitor financial performance | 2.1 Use available systems to monitor and report on financial performance targets, and analyse data to establish extent to which financial goals have been met 2.2 Monitor marketing and operational strategies for their effects on financial goals 2.3 Calculate and evaluate financial ratios according to own business and/or industry benchmarks |
| 3. Review financial performance | 3.1 Assess financial strategy to determine whether variations or alternative plans are needed according to workplace procedures, and change as required 3.2 Research and implement, with relevant personnel, new and emerging digital technologies to boost business profitability according to business plan |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Evaluates complex text to determine legislative, regulatory and workplace documentation |
| Writing | <ul style="list-style-type: none"> Prepares written reports and workplace documentation that communicate complex information clearly and effectively |
| Oral communication | <ul style="list-style-type: none"> Articulates clearly using specific and relevant language suitable to audience to convey requirements, and employs listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical information to calculate required financial information |
| Self-management | <ul style="list-style-type: none"> Identifies implications of legal and regulatory responsibilities for own work Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Initiative and | <ul style="list-style-type: none"> Uses formal and informal processes to monitor implementation of ideas and analyse outcomes |

| Skill | Description |
|-------------------------|---|
| enterprise | |
| Planning and organising | <ul style="list-style-type: none">Develops plans to manage relatively complex, non-routine tasks that may contribute to longer-term operational and strategic goals |

Unit Mapping Information

Supersedes and is equivalent to BSBSMB421 Manage small business finances.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBESB407 Manage finances for new business ventures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement a financial strategy for at least one business or new business venture according to business plan and goals.

In the course of the above, the candidate must:

- adhere to legal requirements
- produce financial projections, including cash flow estimates
- develop a plan to negotiate and manage business assets and financial capital
- define strategies for debt collection and contingencies for debtors
- manage cash flow
- define key indicators for financial performance
- communicate with required people
- seek specialist services, where required
- monitor the financial performance of the business and make changes to strategy as required
- identify opportunities to implement new and emerging digital technologies to support the financial management of the business.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory financial requirements that apply to new business venture described in performance evidence
- key purposes of financial reports
- components of financial budgets or projections, including cash flow estimates
- workplace procedures for:
 - recording and communicating financial procedures to required personnel

- distributing financial budgets and projections
- using digital technologies to monitor and report on financial performance targets and analyse data
- assessing and changing financial plan
- forms, channels and modes of communication used in relation to managing business finances
- key features of business and industry benchmarking used to evaluate financial ratios
- key features of financial decision-making relevant to the business, including:
 - strategies that enable adequate financial provision for taxation
- components of client credit policies, including contingencies for debtors in default
- key features of significant financial indicators
- key features of balance sheet preparation and interpretation
- key features of debt collection procedures and strategies
- key features of profit and loss statement preparation and interpretation
- key features of stock records and stock control relevant to the business.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business equipment and resources, including business technology
- legislation, regulations, codes of practice and standards relating to business described in performance evidence
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBFIN301 Process financial transactions

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to prepare, process and maintain financial transactions and to reconcile outstanding accounts.

The unit applies to individuals employed in a range of work environments supporting the accounting functions of an organisation. They may provide administrative support in an organisation or be members of staff, who have been delegated accounting responsibilities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Financial Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare financial transactions | 1.1 Identify errors in source documents for escalation 1.2 Enter total transactions into organisational journal system according to organisational policies, procedures and accounting requirements 1.3 Identify any discrepancies between cash journals and bank statements 1.4 Refer discrepancies according to organisational escalation procedures |
| 2. Process financial transactions | 2.1 Enter transaction as a journal entry according to organisational policies, procedures and accounting requirements 2.2 Prepare schedules of financial transaction for reconciliation |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>according to organisational requirements</p> <p>2.3 Reconcile schedules with general ledger according to organisational requirements</p> <p>2.4 Rectify original journal entry and escalate, where required</p> |
| 3. Reconcile outstanding accounts | <p>3.1 Prepare reconciliation reports from cash journals to cash receipts</p> <p>3.2 Identify any discrepancies between cash journals and bank statements</p> <p>3.3 Refer discrepancies to management</p> <p>3.4 Maintain general ledger system to reflect current credit situation according to organisational requirements</p> |
| 4. Determine outstanding debt processes | <p>4.1 Identify outstanding accounts and collection procedures according to organisational requirements</p> <p>4.2 Report or follow up outstanding accounts according to organisational policies and procedures</p> <p>4.3 Monitor and review credit terms according to credit policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Numeracy | <ul style="list-style-type: none"> • Uses a limited range of mathematical calculations to reconcile amounts using whole numbers and decimals • Arranges and compares numerical information |
| Reading | <ul style="list-style-type: none"> • Interprets textual information from a range of sources to confirm all necessary job requirements • Checks documents to identify errors or discrepancies |
| Writing | <ul style="list-style-type: none"> • Prepares a range of clear documentation using relevant format, grammatical structure and vocabulary suitable to audience |
| Initiative and enterprise | <ul style="list-style-type: none"> • Identifies legal and regulatory responsibilities related to own work |
| Planning and organising | <ul style="list-style-type: none"> • Plans a range of routine and non-routine tasks recognising stated goals and aiming to achieve them within designated timeframes • Implements standard procedures for routine decisions |
| Problem solving | <ul style="list-style-type: none"> • Identifies predictable problems and applies formal problem-solving processes or seeks advice from others, where required |

| Skill | Description |
|------------|---|
| Technology | <ul style="list-style-type: none">• Uses digital technology to access, filter, compile, integrate and logically present complex information from multiple sources |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBCUE305 Process credit applications
- BSBCUE306 Process complex accounts
- BSBFIA303 Process accounts payable and receivable.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBFIN301 Process financial transactions

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- process four different financial transactions for a reporting period.

In the course of the above, the candidate must:

- enter data into journal and subsidiary ledger system
- develop reconciliation reports from cash journals
- reconcile subsidiary ledger system with journal or general ledger data
- report outstanding accounts
- review credit terms.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation and regulations, standards and codes of practice affecting business financial operations
- types of financial transactions
- cash journals
- general ledger
- accuracy and authorisation requirements for source documents
- key features of organisational accounting systems and procedures
- procedures for checking for errors or discrepancies in financial transactions
- preparation of reconciliation report and schedules of accounts
- organisational policies and procedures for communication related to outstanding debtors
- credit terms according to credit policies and procedures
- applicable accounting standard related to outstanding debtors.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- accounting software
- examples of cash journals, credit journals, accounts payable and accounts receivable subsidiary ledgers
- workplace reference materials including procedural manuals and company policies.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBFIN302 Maintain financial records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to maintain daily financial records such as reconciling systems for debtors and creditors, preparing and maintaining a general ledger and trial balance. It also includes activities associated with monitoring cash control for accounting purposes.

The unit applies to individuals employed in a range of work environments with responsibility for simple accounting functions within an organisation. They may work as individuals providing administrative support within an enterprise or may be other members of staff with delegated responsibilities relating to maintenance of general financial records.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Financial Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare journals required for posting to general ledger | 1.1 Identify transactions required to be included in journal entries 1.2 Identify general ledger accounts affected according to organisational policies, procedures and accounting standards 1.3 Prepare and document the journal entries according to organisational policies, procedures and accounting standards 1.4 Assess follow-up steps for journal entries |
| 2. Post journal entries and reconcile | 2.1 Post journal entries into general ledger system according to organisational policies, procedures and accounting standards |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------|--|
| discrepancies | 2.2 Reconcile accounts payable and accounts receivable subsidiary ledger systems with general ledger 2.3 Rectify any discrepancies and escalate, where required if outside scope of individual authority 2.4 Prepare adjusted journal entries and closing entries for general ledger |
| 3. Maintain general ledger | 3.1 Prepare closing and post-closing trial balance from general ledger system of the organisation 3.2 Prepare trial balance 3.3 Check general ledger for accuracy of information and despatch to relevant stakeholders, where required 3.4 Check trial balance meets accounting equation requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Numeracy | <ul style="list-style-type: none"> • Uses a limited range of mathematical calculations to reconcile amounts using whole numbers and decimals • Integrates data from different sources and records numerical information in a format appropriate to context and purpose of material • Arranges and compares numerical information |
| Reading | <ul style="list-style-type: none"> • Recognises and interprets numerical and textual information to determine job requirements and complete required activities |
| Writing | <ul style="list-style-type: none"> • Uses factual and suitable financial language to refer issues and inconsistencies in data |
| Teamwork | <ul style="list-style-type: none"> • Recognises strengths and expertise of others and seeks their assistance as required |
| Planning and organising | <ul style="list-style-type: none"> • Identifies and monitors adherence to applicable industry standards, legislative and organisational requirements in undertaking own work |
| Self-management | <ul style="list-style-type: none"> • Selects appropriate practices and protocols when handling confidential information • Recognises and addresses problems in the context of own work and seeks advice from others, as necessary |
| Technology | <ul style="list-style-type: none"> • Uses digital technologies to access, record, store, organise and |

| Skill | Description |
|-------|--------------------------|
| | compile data as required |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBFIA301 Maintain financial records
- BSBFIA304 Maintain a general ledger
- BSBINT306 Apply knowledge of international finance and insurance to complete work requirements.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBFIN302 Maintain financial records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- record and process daily transactions for five different days, and identify and respond to discrepancies and errors, according to accounting principles.

In the course of the above, the candidate must:

- enter, transfer and record financial data.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, codes of practice and national standards that may affect both:
 - financial record keeping
 - aspects of financial operations
- key components of organisational accounting systems and procedures
- procedures for checking for errors or discrepancies
- organisational policies and procedures relating to maintaining financial records
- types of financial entries including credits and debits
- tax records required to be kept by businesses
- principles of double entry bookkeeping and accrual accounting
- methods of presenting financial data
- processes for rectifying or referring discrepancies or errors in documentation or transactions to designated persons according to organisational and legislative requirements
- accounting software used in the maintenance of financial records.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- accounting software
- examples of source documents relating to financial record keeping including source journals and daily transactions.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBFIN401 Report on financial activity

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to prepare financial reports in line with statutory reporting requirements. This includes compiling and analysing financial data.

The unit applies to individuals employed in a range of work environments who are responsible for preparing financial reports. They may be individuals providing administrative support within an organisation, or they might have responsibility for these tasks in relation to their own workgroup or role.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Financial Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Compile and analyse financial data | <ul style="list-style-type: none">1.1 Prepare a register of assets from fixed asset transactions according to accounting, legislative and organisational requirements1.2 Calculate depreciation according to legislative and organisational requirements1.3 Make, record and disclose asset and liability valuations in compliance with accounting standards1.4 Refer discrepancies, unusual features or queries to appropriate authority where they cannot be resolved1.5 Identify and record effects of taxation |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| 2. Report general journal entries for balance day adjustments | <ul style="list-style-type: none">2.1 Record all general ledger accounts and prepare a trial balance2.2 Adjust expense accounts and revenue accounts for prepayments and accruals2.3 Make adjustments in general ledger system to close any discrepancies for balance day adjustments according to organisational policies, procedures and accounting requirements2.4 Review data for errors and compliance with statutory requirements and organisational procedures, and amend as required |
| 3. Prepare end of period financial reports | <ul style="list-style-type: none">3.1 Prepare revenue statement for reporting periods according to organisational requirements3.2 Prepare a balance sheet to reflect financial position of business at end of reporting period3.3 Prepare and post revenue and expense account to final general ledger accounts to reflect gross and net profits for reporting period3.4 Correct or refer errors for resolution according to statutory and ethical requirements and organisational procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Numeracy | <ul style="list-style-type: none">• Establishes criteria and categories for financial management purposes and monitors activities on a regular basis• Uses a wide range of mathematical calculations to interpret and arrange numerical information in order to comply with requirements |
| Reading | <ul style="list-style-type: none">• Compares and analyses information from a range of sources varying in complexity to determine and complete financial requirements• Checks documents for errors or discrepancies |
| Writing | <ul style="list-style-type: none">• Records data using relevant format, structure and vocabulary |
| Planning and organising | <ul style="list-style-type: none">• Applies legislation, industry standards and organisational policies and procedures in the conduct of own work• Uses formal and logical processes to plan and complete tasks, achieving timelines and organisational requirements |

| Skill | Description |
|-----------------|---|
| Problem solving | <ul style="list-style-type: none">Addresses problems in the context of own work and seeks advice from others, as necessaryUses analytical skills to identify discrepancies |
| Technology | <ul style="list-style-type: none">Uses digital technology to access, filter, compile, integrate and logically present complex information from multiple sources |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBFIA401 Prepare financial reports
- BSBFIA412 Report on financial activity
- BSBFIA501 Report on finances related to international business
- BSBINT408 Prepare business advice on the taxes and duties for international trade transactions.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBFIN401 Report on financial activity

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare a financial report on at least two occasions.

In the course of the above, the candidate must:

- produce a detailed asset register and depreciation schedule
- record entries for balance day adjustments
- use conversion and consolidation procedures including moving averages, standardised variables, trend analysis and unit costs
- apply double-entry principles and accrual accounting.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- double-entry and accrual principles
- provisions of relevant legislation, regulations, standards and codes of practice relevant to financial operations, taxable transactions and reporting requirements
- components of organisational accounting systems
- organisational policies, procedures and accounting standards relating to preparation of financial reports
- organisational financial data, including:
 - budget variances
 - budgets and forecasts
 - cash flow and profit reports
 - balance sheets
 - financial year reports
 - operating statements

- expenditure and receipts
- profit and loss statements
- types of assets including property, plant and equipment
- comparative financial performance
- financial discrepancies including:
 - absence of auditable trail
 - expenditure report mismatches
 - incorrect payments and unreconciled cash flows
- techniques used for financial forecasting and analysis
- options, methods and practices for deductions, benefits and depreciations
- ethical requirements associated with preparing financial reports for corporate entities, including conflict of interest, confidentiality, and disclosure requirements
- industry-standard methods and formats used to present financial data.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- accounting software
- financial reporting legislation, regulations, standards and codes of practice
- samples of financial data, reports and documents
- workplace reference materials including procedural manuals and company policies.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBFIN501 Manage budgets and financial plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to undertake financial management in an organisation or work area. It includes planning and implementing financial management approaches and supporting and evaluating effectiveness of financial management processes.

The unit applies to managers in a wide range of organisations and sectors who have responsibility for the effective use of financial resources within work teams. They are responsible for ensuring that financial resources are managed in line with the financial objectives of the team and organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Financial Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan financial management approaches | 1.1 Access budget and financial plans for work team 1.2 Evaluate budget and financial plan outcomes with required organisational personnel 1.3 Negotiate any changes required to be made to budget and financial plans with required organisational personnel 1.4 Prepare contingency plans in the event that initial plans need to be varied |
| 2. Implement and monitor financial | 2.1 Communicate details of agreed budget and financial plans to relevant team members |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| management plans | 2.2 Support team members to access resources and systems to perform required roles 2.3 Implement processes to monitor actual expenditure, control costs and modify contingency plans as required according to financial objectives 2.4 Report on budget and expenditure according to organisational protocols |
| 3. Review and evaluate financial management plans | 3.1 Collect information on effectiveness of financial management processes within work team 3.2 Analyse variance between actual and budgeted finances 3.3 Identify and recommend improvements to existing financial management processes 3.4 Implement agreed improvements according to financial objectives of work team and organisation 3.5 Evaluate agreed improvements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Numeracy | <ul style="list-style-type: none"> Uses a wide range of mathematical calculations to analyse numeric information in budgets or financial plans |
| Oral communication | <ul style="list-style-type: none"> Presents information about financial issues and requirements to a range of audiences using structure and language to suit audience Uses active listening and questioning to clarify information and to confirm understanding |
| Reading | <ul style="list-style-type: none"> Interprets and analyses information to determine activities required |
| Writing | <ul style="list-style-type: none"> Records information in correct forms and prepares materials which convey detailed and factual content according to internal procedures |
| Teamwork | <ul style="list-style-type: none"> Uses a range of strategies to connect, collaborate and cooperate with other work colleagues in activities requiring collective effort and diverse skills and knowledge |
| Initiative and enterprise | <ul style="list-style-type: none"> Applies organisational requirements in undertaking own work |
| Planning and organising | <ul style="list-style-type: none"> Uses logical processes in planning, implementing and evaluating complex tasks and developing alternative strategies to achieve goals |

| SKILL | DESCRIPTION |
|------------|--|
| | and timelines |
| Technology | <ul style="list-style-type: none">• Uses a range of digital technologies to access, filter, compile, integrate and logically present complex information from multiple sources |

Unit Mapping Information

Supersedes and is equivalent to BSBFIM501 Manage budgets and financial plans.

Supersedes but is not equivalent to BSBGOV403 Analyse financial reports and budgets.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBFIN501 Manage budgets and financial plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage the budget and financial plan of an organisation for one reporting period.

In the course of the above, the candidate must:

- communicate with relevant people to clarify budget and financial plans, negotiate changes and disseminate information
- prepare, implement and modify financial contingency plans
- monitor expenditure and control costs
- support and monitor team members
- report on budget and expenditure
- review and make recommendations for improvements to financial processes
- meet record-keeping requirements for Australian Taxation Office (ATO) and for auditing purposes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- basic accounting principles
- types of budgets and financial plans
- legislation and current ATO requirements, including the Goods and Services Tax (GST)
- key requirements for financial record keeping and auditing
- principles for managing work teams
- principles and techniques involved in managing:
 - budgeting
 - cash flows
 - electronic spreadsheets

- Goods and Services Tax
- ledgers and financial statements
- profit and loss statements
- evaluation of budget and financial plans.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace policies and procedures
- workplace budgets and financial plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBFIN502 Manage financial compliance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage financial compliance in an organisation or work area. It includes planning financial management processes, implementing necessary change and monitoring effectiveness of the performance of changes implemented.

The unit applies to managers in a wide range of organisations and sectors who have responsibility for ensuring financial compliance within work teams. They support the management of financial resources to ensure that they are managed in line with team, organisation and wider compliance requirements.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Financial Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan for financial compliance | 1.1 Identify financial compliance legislation, regulations, codes of conduct applicable to organisation or work area 1.2 Analyse and document identified legislation, regulations and codes of conduct according to task requirements 1.3 Identify priority risks from risk analysis 1.4 Plan risk mitigation strategies for identified risks 1.5 Establish indicators to measure financial compliance |
| 2. Develop and implement | 2.1 Develop strategies to support financial compliance |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|---|
| strategies for financial compliance | 2.2 Communicate financial compliance strategy to relevant staff 2.3 Ensure relevant staff follow financial compliance strategy |
| 3. Evaluate compliance | 3.1 Monitor financial compliance processes 3.2 Review and adjust financial compliance procedures 3.3 Improve financial compliance systems using evaluation data |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Learning | <ul style="list-style-type: none"> Identifies organisational issues and uses formal thinking techniques to develop a range of possible solutions |
| Numeracy | <ul style="list-style-type: none"> Reviews and analyses numerical data embedded in organisational documentation and legislation Uses appropriate formulae to analyse financial data to assess and manage risk and identify discrepancies |
| Oral communication | <ul style="list-style-type: none"> Presents an explanation of workplace procedures to a group, adapting, reiterating, summarising and clarifying information as required |
| Reading | <ul style="list-style-type: none"> Analyses and evaluates complex information to determine and adhere to organisational or legislative requirements and to assist with financial decision making |
| Writing | <ul style="list-style-type: none"> Prepares documents using format, content and layout appropriate to audience, purpose and regulatory requirements |
| Planning and organising | <ul style="list-style-type: none"> Uses formal analytical thinking techniques to identify issues, investigate underlying causes and generate possible solutions, seeking input from others as required |
| Technology | <ul style="list-style-type: none"> Uses a range of digital technology to access, filter, compile, integrate and logically present complex information from multiple sources |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBFIN502 Manage financial compliance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions, plan, develop, implement and evaluate financial compliance strategies.

In the course of the above, the candidate must:

- identify financial compliance risks in the workplace
- interpret and analyse operational and feedback data relating to compliance
- plan and develop risk mitigation strategies for identified compliance risks
- incorporate risk controls and risk mitigation strategies in policies, procedures and business strategies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, regulations, standards and codes of practice for business financial compliance
- methods and tools for recording, reporting and managing compliance
- procedures for conducting risk analysis
- risk mitigation strategies
- industry best practice and quality standards for financial compliance
- compliance risk ratings.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- computer equipment and software required for the demonstration of the performance evidence
- workplace policies and procedures for financial compliance
- legislation, regulations, standards and codes of practice for financial compliance.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBFIN601 Manage organisational finances

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to undertake budgeting, financial forecasting and reporting. This unit also describes the skills and knowledge required to allocate and manage resources to achieve the required outputs for the business unit. It includes contributing to reviewing financial information, analysing financial risks, preparing a budget and reporting on financial activity.

The unit applies to individuals who have managerial responsibilities which include overseeing the management of financial and other resources across a business unit, a series of business units or teams, or an organisation. It covers all areas of broad financial management. In a larger organisation this work would be supported by specialists in financial management.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Financial Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for financial management | 1.1 Assess reasons for losses or profits identified from previous financial reports 1.2 Analyse critical dates and initiatives in business plan and cash flow trends 1.3 Review statutory requirements for compliance and liabilities for tax 1.4 Analyse existing software and its suitability for financial |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | management |
| 2. Establish budgets and allocate funds | 2.1 Develop budget from previous financial data according to compliance, organisational and statutory requirements 2.2 Circulate budgets and confirm managers and supervisors understand budgets, reporting requirements and financial delegations 2.3 Confirm there are no opportunities for misappropriation of funds 2.4 Review profit and loss statements, cash flows and ageing summaries and revise, where required 2.5 Identify discrepancies between agreed and actual allocations using audit trails |
| 3. Report on finances | 3.1 Identify organisational and statutory financial reporting requirements 3.2 Identify and prioritise significant issues in statements for review and decision making 3.3 Prepare financial recommendations 3.4 Evaluate effectiveness of financial management processes |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Numeracy | <ul style="list-style-type: none"> Reviews and analyses numerical data embedded in organisational documentation and legislation Compares and contrasts complex numerical data to analyse and evaluate financial position and processes Uses appropriate formulae to analyse financial data to assess and manage risk and identify discrepancies |
| Oral communication | <ul style="list-style-type: none"> Explains financial decisions and outcomes clearly and uses listening and questioning techniques to exchange information and obtain agreement |
| Reading | <ul style="list-style-type: none"> Analyses and evaluates complex organisational information and legislative requirements to assist with financial decision making |
| Writing | <ul style="list-style-type: none"> Develops and records information which incorporates a detailed analysis of factual and forecasted information Prepares documents using format, content and layout appropriate to audience, purpose and regulatory requirements |

| SKILL | DESCRIPTION |
|---------------------------|---|
| Teamwork | <ul style="list-style-type: none">• Selects and uses appropriate conventions and protocols when communicating with supervisors and managers to share information or seek agreement |
| Initiative and enterprise | <ul style="list-style-type: none">• Identifies and complies with legislative and organisational requirements in undertaking own work |
| Planning and organising | <ul style="list-style-type: none">• Uses logical processes in planning, implementing and evaluating complex tasks to achieve stated goals• Uses formal analytical thinking techniques to identify issues, investigate underlying causes and generate possible solutions, seeking input from others as required |
| Technology | <ul style="list-style-type: none">• Uses a range of digital technology to access, filter, compile, integrate and logically present complex information from multiple sources• Investigates new digital technologies and applications to manage and manipulate data |

Unit Mapping Information

Supersedes and is equivalent to BSBFIM601 Manage finances.

Supersedes but is not equivalent to BSBGOV504 Monitor organisational finances.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBFIN601 Manage organisational finances

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage finances for at least one organisation or work area.

In the course of the above, the candidate must:

- review previous financial statements
- prepare, implement and revise a budget that:
 - aligns with business plan
 - is based on research and analysis of previous financial data and cash flow trends
 - meets compliance, statutory and organisational requirements
- contribute to financial bids and estimates
- communicate with other people, including:
 - reporting on financial activity and making recommendations
 - ensuring managers and supervisors understand key elements of relevant budgets
- analyse effectiveness of existing financial management approaches, including:
 - reviewing financial management software
 - managing risks of misappropriation of funds
 - ensuring systems are in place to record all transactions
 - maintaining audit trail
 - complying with due diligence.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- processes to establish and review profits and losses from financial statements
- requirements for financial probity
- principles of accounting and financial systems

- key functions of financial management software
- key components of a financial budget
- Legislation and conventions relevant to financial management in organisation
- Australian Tax Office (ATO) requirements for Goods and Services Tax, Company Tax, Pay As You Go (PAYG).

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- financial data
- relevant legislation and Australian Tax Office requirements
- examples of business plans, profit and loss statements, cash flows and ageing summaries
- organisational financial policies and procedures
- financial management software.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBFIN801 Lead financial strategy development

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead the development of financial strategy for an organisation or work area. It covers the use and interpretation of financial information to support business decision making, analysis and enterprise planning. The unit includes the forecasting of future financial requirements and development of business targets in compliance with financial projections.

The unit applies to senior management, including strategic business analysts and executive managers, who use cognitive and creative skills to review, critically analyse and generate ideas and provide solutions to complex problems.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Financial Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare financial strategy | <ul style="list-style-type: none">1.1 Establish capacity of existing financial systems by analysing financial reports1.2 Forecast financial data and business system requirements including additional expenditure requirements1.3 Consult relevant stakeholders, including financial advisers, about financial information to support decisions1.4 Prepare recommendations and assessment indicators for budget expenditure or for modification of existing projections |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | according to organisational and legislative requirements 1.5 Present recommendations to relevant stakeholders |
| 2. Implement financial strategy | 2.1 Identify resourcing requirements to implement financial recommendations 2.2 Communicate recommendations to relevant stakeholders including organisational staff 2.3 Support staff in implementation of recommendations 2.4 Monitor actual income and expenditure against budgets |
| 3. Monitor implementation of financial strategy | 3.1 Identify deviations from budgets that generate an adverse effect on budget objectives 3.2 Promptly develop action plans to remedy significant deviations from budget objectives and projections 3.3 Revise budget priorities to meet operational contingencies and risk management |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Numeracy | <ul style="list-style-type: none"> Applies knowledge of mathematical information to statistically analyse data, confirm reliability, conduct modelling and forecast trends Selects and uses familiar mathematical techniques to calculate costs and to conduct cost benefit analyses |
| Oral communication | <ul style="list-style-type: none"> Uses appropriate language, questioning and listening techniques to provide and elicit information and to articulate policies, plans, results and related information effectively |
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates complex text from a variety of sources to determine business requirements |
| Writing | <ul style="list-style-type: none"> Prepares specific information which clearly conveys an understanding of outcomes and uses terminology appropriate to present to relevant personnel Researches, plans and prepares information for stakeholders incorporating appropriate vocabulary, grammatical structure and numerical conventions |
| Teamwork | <ul style="list-style-type: none"> Collaborates and negotiates with others to achieve joint outcomes, playing an active role in facilitating group interaction and influencing direction |

| Skill | Description |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Applies relevant legislation, industry standards and organisational policies and procedures in the conduct of own work• Defines benefits, costs, risks and feasibility from a broad range of perspectives and think laterally to redesign aspects to address potential issues• Negotiates agreed plans and outcomes and required indicators and routinely monitors and reports on them to identify required corrective actions |
| Problem solving | <ul style="list-style-type: none">• Takes responsibility for high impact decisions in complex situations involving many variables and constraints |
| Self-management | <ul style="list-style-type: none">• Systematically gathers and analyses all relevant information, reviews data and evaluates options to inform decisions about complex strategies |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT803 Use financial and economic information for strategic decision making.

Supersedes but is not equivalent to BSBFIM801 Maintain financial resources.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBFIN801 Lead financial strategy development

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead financial strategy development for at least one organisation or work area.

In the course of the above, the candidate must:

- use and analyse financial and economic information to achieve enterprise objectives and maximise returns on financial resources
- analyse and use budget systems and reporting processes
- monitor and manage financial resources over a full planning-cycle, including setting targets, managing risks and improving compliance mechanisms
- revise forecast according to changes in budget deviations.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- financial risk factors and mitigation procedures
- principles of accounting and budgeting including:
 - balance sheet ratios
 - income statement ratios
 - cash flow statement ratios
 - income and expenditure
 - expenditure forecasting
 - contingency plans
- compliance requirements relating to managing financial resources, including legislative and regulatory responsibilities
- finance and investment decisions to improve financial returns of the organisation

- financial and accounting principles relating to analysing and interpreting financial reports and resources
- financial, accounting and economic terminology and systems relevant to financial strategy
- forecasting financial requirements
- business targets
- business system requirements
- techniques for calculating and analysing financial data and procedures for their applications.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- samples of workplace financial documentation, including contractual and procurement policies
- financial data and documentation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM411 Administer performance development processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist in the effective implementation of a performance development system and to facilitate employee performance.

The unit applies to human resource officers, or people in similar roles, who work under the direction of a human resource manager.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review performance development infrastructure | <ul style="list-style-type: none">1.1 Confirm all team positions have relevant position descriptions specifying key requirements of the role1.2 Assist relevant stakeholders in reviewing the performance management system to ensure it aligns with the strategic direction of the organisation1.3 Prepare performance indicators that are consistent with the position description requirements1.4 Prepare for performance appraisal meetings1.5 Identify relevant organisational procedures for acknowledging good performance and addressing under-performance1.6 Provide relevant advice and support where there is dissention about performance appraisal outcomes, where required |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2. Promote performance development system | 2.1 Communicate requirements of the performance development system to relevant stakeholders 2.2 Coordinate and deliver training to relevant stakeholders on using the performance management system 2.3 Ensure feedback is provided to relevant stakeholders |
| 3. Recommend improvements to performance development system in response to collated data | 3.1 Review performance management documentation and identify trends or problem areas requiring attention 3.2 Review patterns in skill or performance gaps and consider requirements and options for performance development 3.3 Assist relevant stakeholders to revise policies and procedures, as required 3.4 Suggest improvements to the performance management system |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none"> Actively reinforces learning by instructing and training others |
| Reading | <ul style="list-style-type: none"> Critically evaluates and applies content from a range of structurally complex texts to support performance management processes |
| Writing | <ul style="list-style-type: none"> Develops a range of documentation using tone, structure and language suited to context and audience |
| Oral Communication | <ul style="list-style-type: none"> Asks questions and listens carefully to gather and evaluate information Uses appropriate vocabulary and tone to present ideas, give advice and make suggestions Selects and uses appropriate conventions and protocols when communicating with others in a range of work contexts |
| Numeracy | <ul style="list-style-type: none"> Makes basic calculations to ensure work output meets predetermined timeframes |
| Self-management | <ul style="list-style-type: none"> Takes personal responsibility for adhering to and updating explicit and implicit organisational policies and procedures Takes responsibility for planning, sequencing and prioritising tasks required to achieve required outcomes |
| Teamwork | <ul style="list-style-type: none"> Cooperates with others and contributes to work practices where joint outcomes are expected Recognises behaviours and triggers that contribute to conflict and |

| | |
|-----------------|---|
| | <ul style="list-style-type: none">implements strategies to moderate conflictUnderstands how own role meshes with others and contributes to broader work goals |
| Problem solving | <ul style="list-style-type: none">Addresses less predictable problems and initiates standard procedures in response, applying problem-solving processes in determining a solutionContributes to continuous improvement of current work practices by analysing and evaluating outcomes of decisions |

Unit Mapping Information

Supersedes and is equivalent to BSBHRM403 Support performance management process.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM411 Administer performance development processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- promote the implementation of one performance development system for an organisation or work area.

In the course of the above, the candidate must:

- provide advice and information to employees on the benefits of effective performance management, and how it links with performance development
- review the performance development system
- make recommendations for improvement
- analyse the strengths and weaknesses of the performance development system.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key elements and purposes of performance development processes, and their contribution to organisational objectives and the human resource cycle
- strengths and weaknesses of a performance development system
- rewards and incentives schemes
- strategies to provide feedback and training in relation to the performance development system
- warning systems and grievance procedures
- mechanisms to collect and analyse data to review performance development system.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- human resource policies, procedures and documentation relevant to performance development and feedback.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM412 Support employee and industrial relations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to communicate and implement employee relations (ER) and industrial relations (IR) policies and procedures to effectively represent organisations and employers.

The unit applies to individuals who work in support positions, assisting others in dealing with ER and IR conflicts and issues.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Support preparation of Employee and Industrial Relations processes | 1.1 Source and share applicable legislation, agreements, policies and procedures with relevant stakeholders 1.2 Identify sources of specialist information 1.3 Support implementation of organisational agreements, policies and procedures according to relevant organisation, enterprise and statutory requirements 1.4 Communicate the organisation's ER and IR procedures to relevant stakeholders according to relevant organisation, enterprise and statutory requirements |
| 2. Support industrial relations | 2.1 Identify relevant terms and conditions of employment, employee entitlements, awards, agreements, and individual |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>work contracts</p> <p>2.2 Provide support to relevant stakeholders in simple IR disputes</p> <p>2.3 Provide support to relevant stakeholders in negotiation of employee awards, agreements, and workplace conditions</p> <p>2.4 Record and maintain relevant documents</p> |
| 3. Support employee relations | <p>3.1 Identify relevant grievance and conflict resolution processes</p> <p>3.2 Provide support to relevant stakeholders in resolution of simple ER conflicts</p> <p>3.3 Record and maintain relevant documents</p> |
| 4. Contribute to continuous improvement | <p>4.1 Assist required stakeholders to identify issues in ER and IR processes</p> <p>4.2 Contribute to development of continuous improvement activities</p> <p>4.3 Record and maintain documentation relating to continuous improvement</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Comprehends and analyses complex texts from a variety of sources and records to determine relevance to requirements or review implementation of strategies |
| Writing | <ul style="list-style-type: none"> Prepares required documents using language and structure appropriate to purpose and audience |
| Oral Communication | <ul style="list-style-type: none"> Presents information and seeks advice using language and non-verbal features appropriate to audience and context Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Self-management | <ul style="list-style-type: none"> Follows policies, procedures and legislative requirements and identifies implications of new legislation or regulation for self and others Understands responsibilities and limits of own role Plans and organises tasks required to achieve required outcomes, seeking advice from others, as required |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with co-workers in a range of work contexts Collaborates and cooperates with others to achieve required outcomes |

| | |
|-----------------|---|
| | <ul style="list-style-type: none">• Uses effective strategies to moderate conflict and negotiate solutions |
| Problem solving | <ul style="list-style-type: none">• Makes a range of critical and non-critical decisions in relatively complex situations |

Unit Mapping Information

Supersedes and is equivalent to BSBWRK411 Support employee and industrial relations procedures.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM412 Support employee and industrial relations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare and support ER (employee relations) and IR (industrial relations) processes for an organisation or work area, on at least two occasions.

In the course of the above, the candidate must:

- locate information required to identify relevant legislation, agreements, policies and procedures
- use effective communication techniques to support the resolution of simple workplace grievances and conflicts
- provide accurate written and oral advice about industrial matters
- use strategies to monitor and gather feedback on the implementation of industrial relations policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key aspects of ER and IR and application in the workplace
- relevant industrial relations policies and procedures
- key features of grievance resolution policy and procedures
- relevant legislation, codes of practice and national standards
- relevant state/territory and federal industrial relations systems
- key sources of expert advice relevant to performance evidence.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation, regulations, standards and codes
- relevant workplace policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM413 Support the learning and development of teams and individuals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to determine individual and team development needs and to facilitate the development of the workgroup.

The unit applies to individuals with a broad knowledge of learning and development who apply their skills in addressing development needs to meet team objectives. They may have responsibility to provide guidance or to delegate aspects of tasks to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to needs development | 1.1 Collect information on performance of team members from relevant sources 1.2 Identify individual and team learning and development needs in line with organisational requirements 1.3 Confirm learning plans meet individual and group training and development needs 1.4 Provide opportunities to individuals to self-evaluate performance and identify areas for improvement |
| 2. Support implementation of | 2.1 Develop collaborative learning plans to match skill needs of individuals and groups and match the competency standards |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| learning and development | <p>relevant to the industry</p> <p>2.2 Ensure learning delivery methods are relevant to the participants</p> <p>2.3 Identify and coordinate workplace learning opportunities to facilitate individual and team achievement of competencies</p> <p>2.4 Identify and manage resources and timelines relevant for learning activities according to organisational requirements</p> |
| 3. Monitor and evaluate workplace learning | <p>3.1 Monitor learning plans to improve the efficiency and effectiveness of learning</p> <p>3.2 Seek feedback from individuals or teams to identify and implement improvements in future learning arrangements</p> <p>3.3 Assess and record outcomes and performance of individuals and teams to determine the effectiveness of development programs and the extent of additional development support</p> <p>3.4 Document and maintain records and reports of competency according to organisational requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> • Uses structured approaches to set goals, monitor progress and adjust learning approaches for self and others • Builds on knowledge and experience to facilitate interaction and learning with others |
| Reading | <ul style="list-style-type: none"> • Analyses textual information from a range of sources to identify organisational requirements • Analyses information from a range of sources to evaluate performance |
| Writing | <ul style="list-style-type: none"> • Develops materials to suit the requirements of different roles and individuals in the organisation • Maintains records using correct technical and organisational vocabulary |
| Oral Communication | <ul style="list-style-type: none"> • Uses vocabulary appropriate to context and to establish a supportive and learning environment • Uses listening and questioning techniques to confirm or show understanding of different perspectives • Selects and uses appropriate conventions and protocols when communicating with co-workers in a range of work contexts |

| SKILL | DESCRIPTION |
|-----------------|---|
| Self-management | <ul style="list-style-type: none">• Recognises and responds to explicit and implicit organisational procedures and protocols• Understands how own role meshes with others and contributes to broader goals |
| Teamwork | <ul style="list-style-type: none">• Recognises the importance of building rapport to establish effective working relationships• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction• Negotiates with others to achieve agreeable outcomes playing an active role in facilitating consensus in potentially contentious situations |
| Problem solving | <ul style="list-style-type: none">• Uses logical planning processes to organise, implement and monitor learning and development needs• Systematically gathers and analyses all relevant information and evaluates options to make informed decisions• Evaluates outcomes of decisions to identify opportunities for improvement |

Unit Mapping Information

Supersedes and is equivalent to BSBLED401 Develop teams and individuals.

Supersedes but is not equivalent to:

- BSBFLM311 Support a workplace learning environment
- BSBLED301 Undertake e-learning.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM413 Support the learning and development of teams and individuals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to, facilitate and monitor learning and development for at least one team and for at least one individual.

In the course of the above, the candidate must:

- collect data on team and individual and team development needs
- collaboratively develop learning plans to match skill needs of individuals and groups
- coordinate learning opportunities
- give and receive feedback during the implementation of learning plans
- monitor and review workplace learning plan implementation plans.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- facilitation techniques to support team development and improvement
- organisational policies, plans and procedures for developing teams
- career paths and competency standards relevant to the industry
- key sources of information relevant to inform development needs
- key features of learning and development methods.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- learning and development plans, policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM414 Use human resources information systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to use human resource information systems.

The unit applies to individuals with a theoretical knowledge of human resource management and human resource information systems (HRIS) who use technical and managerial techniques to plan, carry out and evaluate their own work and the work of a team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify and collect required HRIS data inputs | 1.1 Identify HRIS data requirements 1.2 Collect, and collate data of relevant stakeholders 1.3 Document and input collated data into HRIS |
| 2. Use HRIS information and functions | 2.1 Access HRIS database and retrieve relevant information 2.2 Use payroll function in HRIS 2.3 Use recruitment and retention functions in HRIS 2.4 Use other required functions in HRIS according to organisational policies and procedures |
| 3. Monitor and evaluate own use of HRIS | 3.1 Monitor own use of HRIS 3.2 Obtain feedback from relevant stakeholder about the system |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| | performance 3.3 Identify performance gaps and recommend improvements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none">Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and organisational requirements |
| Writing | <ul style="list-style-type: none">Demonstrates clear writing skills by selecting appropriate conventions and stylistic devices to express precise meaning relevant to context and audience |
| Oral Communication | <ul style="list-style-type: none">Draws on a repertoire of open questioning and active listening to obtain feedback and confirm requirementsUses appropriate terminology and non-verbal features to explain requirements |
| Numeracy | <ul style="list-style-type: none">Completes basic calculations to determine time taken to complete work within predetermined timelinesPrepares basic estimates, cost benefit and risk analyses according to pre-existing budgets |
| Self-management | <ul style="list-style-type: none">Adheres to all relevant organisational policies and procedures, and considers own role in terms of its contribution to broader goals of work environmentAccepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with othersMonitors progress of plans and schedules, and reviews and changes them to meet new demands and priorities |
| Teamwork | <ul style="list-style-type: none">Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction |
| Problem solving | <ul style="list-style-type: none">Applies systematic and analytical decision-making processes for complex and non-routine situationsUses evaluation and analysis as a means to continuously improve work practices and processes |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBHRM502 Manage human resource management information systems.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM414 Use human resources information systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use at least give different functions of a human resource information system (HRIS).

In the course of the above, the candidate must:

- monitor use of HRIS and recommend improvements
- collect data to input into HRIS.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- common features and functions of an HRIS
- key methods of monitoring use of human resource management functions
- organisational policies, procedures, protocols and processes applicable to using HRIS.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace resources relevant to performance evidence
- relevant policies and procedures
- relevant legislation, regulations and codes of practice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM415 Coordinate recruitment and onboarding

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and implement strategies to source candidates and to assess their suitability for available positions.

The unit applies to individuals working in a human resources job role, as well as those for whom recruitment and onboarding are part of their broader duties.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan for recruitment | 1.1 Establish recruitment requirements and authority to fill position 1.2 Consult with relevant stakeholders about job descriptions, selection criteria and workforce strategy 1.3 Contribute to development of job descriptions that accurately reflect the role requirements according to relevant policies, procedures and legislative requirements 1.4 Implement strategies to assist in sourcing candidates according to organisational policies and procedures |
| 2. Screen and interview potential candidates | 2.1 Conduct preliminary screening with candidates according to legislative requirements 2.2 Organise and conduct interviews and selection activities according to organisational policies and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|---|
| | 2.3 Carry out skills assessment relevant to the position 2.4 Obtain relevant additional information from candidates |
| 3. Assess and select candidates | 3.1 Consult with relevant stakeholders to conduct assessment and selection process according to organisational policy and legislative requirements 3.2 Assess candidates against specified selection criteria and referee reports 3.3 Prepare recommendations for relevant stakeholders and document according to organisational procedures |
| 4. Manage candidate outcomes | 4.1 Inform all candidates of selection decisions 4.2 Provide feedback to candidates according to organisational policies and procedures 4.3 Secure preferred candidate's agreement 4.4 Coordinate necessary documentation according to organisational procedures, observing confidentiality and privacy requirements |
| 5. Onboard successful candidate | 5.1 Advise relevant stakeholders of new appointment, including start date 5.2 Make necessary administrative arrangements for pay and employee record keeping 5.3 Coordinate successful candidate's onboarding according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none">Interprets a range of textual information from a variety of sources and analyses and reviews for compliance and suitability |
| Writing | <ul style="list-style-type: none">Prepares concise notes to help synthesise information sourced during researchProduces reports and other business communication for a range of contexts and audiences using relevant language and structure |
| Oral Communication | <ul style="list-style-type: none">Asks questions and listens carefully to gather, interpret or evaluate informationParticipates in verbal exchanges using clear language and appropriate tone to provide relevant information and feedback |

| | |
|-----------------|---|
| Self-management | <ul style="list-style-type: none">• Applies workplace protocols, legislation or regulations relevant to own responsibilities• Selects and uses appropriate conventions and protocols when communicating with candidates or clients• Takes responsibility for planning and implementing tasks for efficient and effective outcomes |
| Teamwork | <ul style="list-style-type: none">• Participates in conversations relevant to role responding, explaining, negotiating and persuading, as required |
| Problem solving | <ul style="list-style-type: none">• Uses systematic, analytical processes to evaluate information and make decisions |

Unit Mapping Information

Supersedes and is equivalent to BSBHRM405 Support the recruitment, selection and induction of staff.

Supersedes but is not equivalent to:

- BSBEMS401 Develop and implement business development strategies to expand client base
- BSBEMS402 Develop and implement strategies to source and assess candidates
- BSBEMS403 Develop and provide employment management services to candidates
- BSBEMS404 Manage the recruitment process for client organisations
- BSBSMB417 Recruit staff.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM415 Coordinate recruitment and onboarding

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- coordinate the recruitment and onboarding of two candidates.

In the course of the above, the candidate must:

- demonstrate the process for screening and interviewing a candidate
- communicate effectively with clients and successful and unsuccessful candidates
- review job descriptions and use them to support sourcing, selecting and appointing suitable staff
- consult with relevant stakeholders to gain approvals
- develop selection criteria and interview questions in consultation with relevant stakeholders
- obtain referees' reports
- provide a written report or demonstration of an assessment of a candidate's skills and selection recommendation
- secure preferred candidate's agreement and provide an employment contract.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, regulations, standards and codes of practice that affect employment agencies and organisation's recruiting processes
- common interview techniques and recruitment sourcing methods
- common methods of attracting candidates
- methods to assess and report on candidates according to organisational procedures
- strategies to provide feedback to candidates according to organisational procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace policies and procedures relevant to performance evidence
- position descriptions
- legislation, regulations, Codes and Standards relevant to staff recruitment, selection and onboarding.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM416 Process payroll

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to process payroll from provided data using manual and computerised payroll systems.

The unit applies to individuals employed in a range of work environments who are responsible for payroll functions within an organisation. They may work as individuals providing administrative support within an enterprise or may be other members of staff who have been delegated payroll responsibilities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Record payroll data | 1.1 Check payroll data and clarify discrepancies with relevant stakeholder 1.2 Enter employee pay period details in payroll system according to organisational requirements 1.3 Calculate individual employee's payment according to employee source data |
| 2. Prepare payroll | 2.1 Prepare payroll according to organisational policy and procedures and designated timelines 2.2 Reconcile total wages for pay period, check and correct irregularities or refer to relevant stakeholder for resolution |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------|---|
| | 2.3 Make arrangements for payment according to organisational and individual requirements 2.4 Obtain authorisation of payroll and individual pay advice according to organisational requirements 2.5 Produce, check and store payroll records according to organisational policy and security procedures 2.6 Follow security procedures for processing payroll and for maintaining payroll records |
| 3. Handle payroll enquiries | 3.1 Respond to payroll enquiries according to organisational and legislative requirements 3.2 Provide payroll information according to organisational and legislative requirements 3.3 Ensure all enquiries outside area of responsibility and knowledge are referred to designated persons for resolution 3.4 Complete additional information or follow-up action within designated timelines according to organisational policy and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets a range of textual information to determine activities required |
| Writing | <ul style="list-style-type: none"> Accurately records textual information and maintains personal and banking details using format, language and structure in context |
| Oral Communication | <ul style="list-style-type: none"> Explains payment clearly using terminology and tone appropriate to audience Uses questioning and listening skills in verbal exchanges to clarify information |
| Numeracy | <ul style="list-style-type: none"> Uses a limited range of mathematical calculations to calculate and reconcile amounts and arrange and compare numerical information |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for own workload and monitors adherence to specified goals and timelines |
| Teamwork | <ul style="list-style-type: none"> Selects the appropriate mode of communication for a specific purpose Collaborates with others to achieve predetermined goals |

| | |
|-----------------|--|
| Problem solving | <ul style="list-style-type: none">• Recognises and takes responsibility for resolving problems relevant to own role• Takes responsibility for routine low-impact decisions within familiar situations |
| Technology | <ul style="list-style-type: none">• Uses digital technologies to access, record, store, organise and compile data, as required |

Unit Mapping Information

Supersedes and is equivalent to BSBFIA302 Process payroll.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM416 Process payroll

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- process payroll for an organisation or work area on at least three occasions.

In the course of the above, the candidate must:

- respond to routine payroll enquiries
- refer enquiries outside area of responsibility to an appropriate authority.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, standards and codes of practice that may affect payroll operations
- relevant organisational policies and procedures
- key features of different types of payroll systems
- processes associated with Single Touch Payroll (STP).

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources relevant to performance evidence
- payroll data (samples or actual).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM417 Support human resources functions and processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to support work across a range of human resource functional areas.

The unit applies to individuals who require a broad understanding of human resource functions, associated policy frameworks and the administrative requirements to support these functions and policies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify human resources functions | 1.1 Identify business strategy and human resource strategy 1.2 Identify different human resource networks for human resource professionals 1.3 Identify information sources to obtain human resource data and information |
| 2. Review policy and procedures frameworks | 2.1 Identify policies and procedures relevant to the organisation 2.2 Analyse strengths and weaknesses of organisation's policies and procedures 2.3 Identify sustainability issues that relate to human resource functions |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| 3. Apply ethical framework | 3.1 Review ethical requirements associated with the human resource function 3.2 Apply ethical obligations to own role and decisions 3.3 Document behaviours associated with working ethically in the area |
| 4. Analyse human resource metrics | 4.1 Select relevant technology to gather workforce data and information to review human resource functions 4.2 Identify and use different sources of workforce data 4.3 Collate and analyse data and establish key trends and critical information |
| 5. Report outcomes of review and analysis | 5.1 Identify options for change relevant to organisation's culture 5.2 Identify and evaluate possible change barriers 5.3 Collate, analyse and document key findings relating to policy and procedure frameworks 5.4 Write report on outcomes of review and analysis 5.5 Develop recommendations for change |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-----------------|---|
| Reading | <ul style="list-style-type: none"> Critically evaluates and applies content from a range of structurally complex texts |
| Writing | <ul style="list-style-type: none"> Develops a range of documentation using tone, structure and language suited to context and audience |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for following explicit and implicit policies, procedures and legislative requirements Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes Makes routine decisions and implements standard procedures for routine tasks, using formal decision-making processes for more complex and non-routine situations |
| Problem solving | <ul style="list-style-type: none"> Contributes to continuous improvement of current work practices by applying basic principles of analytical and lateral thinking |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with relevant stakeholder Forms connections with others who can contribute to effective work |

| SKILL | DESCRIPTION |
|------------|---|
| | outcomes |
| Technology | <ul style="list-style-type: none">• Uses the main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBHRM404 Review human resource functions.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM417 Support human resources functions and processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions, support key human resource functions and/or processes for an organisation or work area.

In the course of the above, the candidate must:

- use appropriate technology to collect and analyse workforce data.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of legal and compliance requirements that apply to the organisation
- relevant organisational policies and procedures
- relevant ethical parameters
- key features of information technology used to analyse human resource metrics
- roles and responsibilities of human resource practitioners
- types of human resources networks including local, state or territory, national and international.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business and human resource strategies
- human resource policies and procedures, including ethical framework
- relevant legislation, regulations and codes of practice

- workforce data.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM521 Facilitate performance development processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and facilitate implementation of performance development processes and to coordinate individual or group learning and development to encourage effective employee performance.

This unit applies to individuals who are authorised to establish effective performance development processes for an organisation and who may have staff reporting to them.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan facilitation of performance development process | 1.1 Identify relevant policies and objectives to be addressed in process 1.2 Develop objectives for performance development processes 1.3 Consult with relevant stakeholders about the processes and agree on process features |
| 2. Coordinate performance development process | 2.1 Train relevant groups and individuals in ways to monitor performance 2.2 Work with line managers to ensure performance is monitored regularly and intervention occurs where relevant according to organisational policies and legal requirements 2.3 Support line managers to coach and discipline employees who |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>perform below standard</p> <p>2.4 Communicate dispute resolution processes where relevant, mediating between line managers and employees</p> <p>2.5 Provide support to terminate employees who fail to respond to interventions according to legislative requirements and organisational policies and procedures</p> <p>2.6 Ensure recorded outcomes of performance development sessions are stored securely and accessible to relevant stakeholders, according to organisational policy</p> <p>2.7 Evaluate and suggest improvements to all aspects of performance development processes according to organisational objectives, policies and procedures</p> |
| 3. Coordinate individual or group learning and development | <p>3.1 Design and develop learning and development plans and strategies to encourage effective employee performance</p> <p>3.2 Deliver learning and development plans relevant to agreed timeframes, ensuring achievement of specified outcomes</p> <p>3.3 Contract relevant providers for performance development, as identified by plans and according to organisational policy</p> <p>3.4 Monitor learning and development activities to ensure compliance with quality assurance standards</p> <p>3.5 Negotiate remedial action with providers, where relevant</p> <p>3.6 Generate reports to advise relevant managers on progress and success rates of activities</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and critically analyses organisational strategic and operational plans to identify relevant policies and objectives to be addressed |
| Writing | <ul style="list-style-type: none"> Uses broad vocabulary, grammatical structure and conventions appropriate to text when developing objectives, designing methods and processes and reporting |
| Oral communication | <ul style="list-style-type: none"> Conveys information using language, format and style appropriate to a specific audience Uses listening and questioning to extract main ideas from oral texts or to confirm and clarify understanding |

| SKILL | DESCRIPTION |
|-----------------|---|
| Numeracy | <ul style="list-style-type: none">• Selects from, and applies, mathematical and problem solving strategies when reporting on success rates of activities |
| Self-management | <ul style="list-style-type: none">• Understands and interprets organisational policies and procedures in order to formulate processes relevant to own role requirements• Monitors adherence to legal and regulatory rights and responsibilities for self and possibly others• Accepts responsibility for planning, scheduling and sequencing complex tasks to meet organisational and legislative requirements |
| Teamwork | <ul style="list-style-type: none">• Selects and implements appropriate communication protocols to liaise with stakeholder in a range of work contexts• Supports line managers to achieve goals, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion• Negotiates with others to achieve agreeable outcomes playing an active role in facilitating consensus in contentious situations |
| Problem solving | <ul style="list-style-type: none">• Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria |
| Technology | <ul style="list-style-type: none">• Uses digital systems and tools to store, access and organise digital information |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBHRM512 Develop and manage performance management processes.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM521 Facilitate performance development processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan and facilitate performance development process for an organisation or work area which supports business goals.

In the course of the above, the candidate must:

- consult with stakeholders
- coordinate and implement individual and group learning and development
- train line managers and other relevant people to manage performance
- provide support to line managers to manage performance issues
- develop approaches to improve performance and address identified performance gaps.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- common characteristics of a learning organisation
- organisational policies and legislation relevant to performance management
- key aspects of grievance procedures
- models for giving feedback and options for skill development
- methods for designing performance development processes
- organisational human resources and business objectives
- common methods of monitoring performance.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational strategic and operational plans
- workplace policies and procedures relevant to performance evidence
- relevant legislation, regulations and codes of practice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM522 Manage employee and industrial relations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage employee relations (ER) and industrial relations (IR) matters in an organisation. It involves developing and implementing ER and IR policies and plans and managing conflict resolution negotiations.

The unit applies to those who are authorised to oversee IR and manage conflict and grievances in an organisation. They will have a sound theoretical knowledge base in human resources management and IR as well as current knowledge of ER and IR trends and legislation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop ER and IR policies and plans | 1.1 Determine long term ER strategy according to organisational objectives 1.2 Analyse existing ER performance in relation to workforce objectives 1.3 Evaluate options in terms of cost-benefit, risk-analysis and relevant industrial instruments 1.4 Consult relevant internal stakeholders and develop IR policies and plans 1.5 Identify the skills and knowledge relevant for management and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | the workforce to effectively implement these strategies and policies |
| 2. Implement ER and IR policies and plans | 2.1 Develop implementation plan and contingency plan for ER and IR policies and strategies 2.2 Organise training and development for identified requirements to support ER and IR plan 2.3 Agree on changes required by the organisational policies and implementation plan 2.4 Document procedures for addressing grievances and conflict according to organisational policies and procedures 2.5 Identify and communicate key procedures for addressing grievances and conflict to stakeholders 2.6 Review ER and IR policies and plans and establish whether they are meeting their intended outcomes |
| 3. Manage negotiations to resolve conflict | 3.1 Develop and deliver training to individuals in conflict-management techniques and procedures 3.2 Identify, and where relevant alleviate or eliminate, sources of conflict or grievance according to legal requirements 3.3 Evaluate documentation and other information sources and clarify issues in dispute and ensure completeness, balance and relevance 3.4 Obtain expert or specialist advice and/or refer to precedents, if required 3.5 Determine and apply negotiation strategy 3.6 Advocate the organisation's position to reach a resolution that aligns with organisational objectives |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|--|
| Reading | <ul style="list-style-type: none"> Interprets, critically analyses and applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Displays knowledge of required structure and layout, employing broad vocabulary, grammatical structure and conventions appropriate to purpose and audience |
| Oral | <ul style="list-style-type: none"> Conveys information using language and non-verbal features appropriate to the audience |

| SKILL | DESCRIPTION |
|---------------------------|--|
| communication | <ul style="list-style-type: none">• Employs listening and questioning techniques to clarify and confirm understanding |
| Numeracy | <ul style="list-style-type: none">• Extracts and evaluates the mathematical information embedded in a range of tasks and texts |
| Initiative and enterprise | <ul style="list-style-type: none">• Modifies or develops organisational policies to achieve organisational goals and comply with legislative requirements• Keeps up to date on changes to legislation or regulations relevant to own rights and responsibilities and considers implications of these |
| Teamwork | <ul style="list-style-type: none">• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion• Actively builds networks that include key people with expert skills and knowledge• Uses a range of strategies to facilitate an acceptable outcome for all parties where conflicts occur |
| Problem solving | <ul style="list-style-type: none">• Sequences and schedules complex activities, monitors implementation and manages relevant communication• Uses analytical techniques to identify issues and generate possible solutions, seeking input from others, as required, before making decisions or implementing solutions• Draws on the diverse perspectives of others to gain insights into current practices and opportunities for change |

Unit Mapping Information

Supersedes and is equivalent to BSBWRK520 Manage employee relations.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM522 Manage employee and industrial relations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement ER and IR policies and plans in at least one work area.

In the course of the above, the candidate must:

- analyse organisational documentation and determine long-term ER objectives and current ER performance
- collaborate with others to develop and review IR policies and plans
- develop implementation and contingency plans for IR policies
- identify the skills and knowledge needed to implement the plan and organise training and development for self and staff
- document and communicate strategies and procedures for eliminating and dealing with grievances and disputes
- train others in conflict-resolution techniques
- manage IR conflicts, including advocating the organisation's position during negotiations and documenting, implementing and following up agreements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- relevant IR legislation or regulations
- key features of enterprise and workplace bargaining processes
- key features of relevant entities in the current Australian IR system, including courts and tribunals, trade unions and employer bodies
- key sources of expert ER and IR advice
- relevant organisational policies and procedures
- key features of organisational objectives
- key aspects of cost-benefit, risk-analysis and current legislative requirements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- awards and enterprise bargaining agreements
- relevant legislation, regulations, standards and codes
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM523 Coordinate the learning and development of teams and individuals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate the learning and development of teams and individuals. Particular emphasis is on the coordination of strategies to facilitate and promote learning and to monitor and improve learning performance.

The unit applies to individuals who have a role in coordinating the development of a learning environment in which work and learning come together. At this level work will normally be carried out within complex and diverse methods and procedures, which require the exercise of considerable discretion and judgement, using a range of problem solving and decision-making strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Coordinate creation of learning opportunities | 1.1 Identify potential formal and informal learning opportunities 1.2 Identify learning requirements of teams and individuals according to requirements of organisation and available learning opportunities 1.3 Coordinate implementation of learning plans and ensure that learning plans reflect diversity of needs 1.4 Review relevant organisational procedures and ensure they |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>support individual and team access to learning opportunities, where required</p> <p>1.5 Consult with training and development specialists and use their advice to contribute to learning opportunities</p> |
| 2. Coordinate learning | <p>2.1 Coordinate strategies to ensure workplace learning opportunities are used by teams and individuals</p> <p>2.2 Coordinate implementation of policies and procedures to encourage team members to assess their own competencies and identify their own learning and development needs</p> <p>2.3 Communicate benefits of learning with others in the team and organisation</p> <p>2.4 Recognise workplace achievement by relevant recognition, feedback and rewards</p> |
| 3. Monitor and improve learning effectiveness | <p>3.1 Monitor team and individual learning performance to determine type and extent of any additional work-based support required</p> <p>3.2 Use feedback from individuals and teams to identify and recommend improvements in future learning arrangements</p> <p>3.3 Suggest adjustments, negotiated with training and development specialists, for improvements to learning</p> <p>3.4 Record and report learning and development of teams and individuals</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and to organisational requirements |
| Writing | <ul style="list-style-type: none"> Uses information from a range of sources to develop and document plans, strategies and feedback according to organisational requirements Maintains records using correct technical and organisational vocabulary |
| Oral Communication | <ul style="list-style-type: none"> Present information and opinions using language and features appropriate to the audience and context Uses questioning and listening techniques to identify learning needs and obtain feedback |
| Initiative and | <ul style="list-style-type: none"> Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative and regulatory requirements |

| SKILL | DESCRIPTION |
|-----------------|--|
| enterprise | <ul style="list-style-type: none"> Understands how own role meshes with others and contributes to broader goals |
| Teamwork | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion Recognises the importance of building rapport to establish effective working relationships Applies a range of communication strategies to encourage others to share their knowledge and skills and reflect on the effectiveness of the interaction |
| Problem solving | <ul style="list-style-type: none"> Uses logical processes to plan, implement and monitor learning in the workplace Systematically gathers and analyses relevant information and evaluates options to make informed decisions |
| Technology | <ul style="list-style-type: none"> Uses digital tools to organise, store, integrate and share relevant information |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBLED501 Develop a workplace learning environment.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM523 Coordinate the learning and development of teams and individuals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- coordinate learning and development for at least one team and for at least one individual.

In the course of the above, the candidate must:

- liaise with training and development specialists
- recognise workplace achievement by giving feedback, recognition and rewards
- monitor and recommend improvements for workplace learning
- record and report workplace learning outcomes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- how management of relationships can achieve a learning environment
- principles and techniques involved in the management and organisation of:
 - adult learning
 - coaching and mentoring
 - consultation and communication
 - improvement strategies
 - leadership
 - learning environment and learning culture
 - monitoring and reviewing workplace learning
 - problem identification and resolution
 - record keeping and management methods
 - structured learning
 - work-based learning.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant organisational policies and procedures
- workplace equipment and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM524 Coordinate workforce plan implementation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate the implementation of a workforce plan, including researching requirements, coordination of planning and implementing initiatives and monitoring trends.

The unit applies to individuals who are human resource practitioners or staff members with a role in a policy or planning unit that focuses on workforce planning.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Research workforce requirements | 1.1 Review current data on staff turnover and demographics 1.2 Assess factors impacting workforce supply 1.3 Establish organisation's requirements for a skilled and diverse workforce |
| 2. Coordinate workforce objectives and strategies | 2.1 Consult relevant stakeholders on organisational strategy and establish aligned objectives for modification or retention of the workforce 2.2 Confirm objectives for workforce diversity and cross-cultural management with relevant stakeholders 2.3 Assist determination of strategies to address high staff turnover 2.4 Assist determination of objectives to retain relevant skilled |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | labour 2.5 Assist determination of strategies to source skilled labour 2.6 Communicate plan objectives to relevant stakeholders 2.7 Obtain agreement and endorsement for objectives and establish targets |
| 3. Coordinate implementation of initiatives | 3.1 Support implementation of agreed objectives for recruitment, training, redeployment and redundancy 3.2 Identify strategies to assist workforce to deal with organisational change and coordinate implementation 3.3 Identify strategies to assist in meeting the organisation's workforce diversity goals and coordinate implementation 3.4 Coordinate implementation of succession planning system and ensure workers are developed and retained |
| 4. Monitor and evaluate workforce trends | 4.1 Review workforce plan against patterns in existing employee and workforce changes 4.2 Monitor labour supply trends for areas of over and under supply in the external environment 4.3 Monitor effects of labour trends on the demand for labour within own organisation 4.4 Coordinate survey of organisational climate and collect worker satisfaction results 4.5 Consult with relevant stakeholders and refine objectives and strategies in response to internal and external changes 4.6 Monitor government policy on labour demand and supply 4.7 Evaluate effectiveness of change processes against agreed objectives |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|--|
| Reading | <ul style="list-style-type: none"> Interprets and critically analyses organisational strategy and data on staff turnover and demographics |
| Writing | <ul style="list-style-type: none"> Uses broad vocabulary, grammatical structure and conventions appropriate to audience and context to develop strategies, plans or reports |
| Oral | <ul style="list-style-type: none"> Conveys information using language, format and style appropriate to a |

| SKILL | DESCRIPTION |
|---------------------------|---|
| communication | specific audience |
| Numeracy | <ul style="list-style-type: none">Extracts and applies mathematical information and problem-solving strategies when monitoring labour trends and surveying organisational climate |
| Initiative and enterprise | <ul style="list-style-type: none">Understands and interprets organisational goals to develop processes, objectives or strategies relevant to own role requirementsSelects and implements appropriate communication protocols to liaise with stakeholders in a range of work contexts |
| Self-management | <ul style="list-style-type: none">Sequences and schedules complex activities, monitors implementation and manages relevant communication when researching requirements and developing workforce objectives and strategiesUses a range of digital tools to collect data, and to extract, organise and share information |
| Problem solving | <ul style="list-style-type: none">Anticipates potential problems and uses analytical or lateral thinking processes to formulate contingency plansMakes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account when assessing factors affecting workforce supply |

Unit Mapping Information

Supersedes and is equivalent to BSBHRM513 Manage workforce planning.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM524 Coordinate workforce plan implementation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- coordinate the implementation of a workforce plan in at least one work area.

In the course of the above, the candidate must:

- review relevant trends and supply and demand factors that will impact on organisation's workforce
- review and interpret information from a range of internal and external sources, in order to identify:
 - current staff turnover and demographics
 - labour supply trends factors that may affect workforce supply
 - organisation's workforce requirements objectives and strategies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of external labour supply relevant to the specific industry or skill requirements of the organisation
- key features of industrial relations relevant to the specific industry
- labour force analysis and forecasting techniques
- common programs that ensure workplace is an employer of choice
- key aspects of:
 - staff turnover and demographics factors
 - sources of skilled labour
 - contingency plans
 - strategies for recruitment, training, redeployment and redundancy
 - strategies to assist in meeting the organisation's workforce diversity goals

- format and content of workforce plan according to organisational procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- organisational strategic and operational plans
- relevant organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM525 Manage recruitment and onboarding

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage all aspects of recruitment and onboarding processes according to organisational policies and procedures.

The unit applies to individuals who take responsibility for managing aspects of recruiting, selecting new staff and orientating those staff in their new positions. The individual may be directly involved in the recruitment processes themselves or coordinating the process.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop recruitment and onboarding policies and procedures | 1.1 Identify existing recruitment and onboarding policies and procedures 1.2 Assess options for technology to improve efficiency and effectiveness of recruitment process 1.3 Update existing policies and procedures according to organisational requirements 1.4 Obtain support for policies and procedures from relevant stakeholders 1.5 Create forms and documents supporting policies and procedures and make adjustments, where required 1.6 Communicate policies and procedures to relevant staff and |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|---|
| | provide training, where required |
| 2. Manage recruitment process | 2.1 Determine future human resource requirements in collaboration with relevant stakeholders 2.2 Ensure current position descriptors for vacancies are used by relevant stakeholders involved in recruitment and onboarding processes 2.3 Ensure advertising of vacant positions complies with legislation and organisational policies and procedures 2.4 Consult and use specialists, where required 2.5 Ensure selection procedures are according to legislation and organisational policies and procedures 2.6 Ensure processes for advising applicants of selection outcome are followed 2.7 Ensure job offers and contracts of employment are prepared and provided promptly, and new appointments are provided with relevant advice |
| 3. Manage staff onboarding | 3.1 Provide access to training and support to relevant stakeholders 3.2 Ensure onboarding processes are followed across the organisation 3.3 Oversee management of probationary employees and provide feedback until employment is confirmed or terminated 3.4 Collect feedback from participants and relevant stakeholders on onboarding process according to its objectives 3.5 Update onboarding policies and procedures according to feedback |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Critically evaluates and applies content from a range of complex texts to determine legislative and business requirements |
| Writing | <ul style="list-style-type: none"> Demonstrates clear writing skills by selecting appropriate conventions and by expressing precise meaning relevant to context and audience |
| Oral Communication | <ul style="list-style-type: none"> Draws on a repertoire of open questioning and active listening when seeking feedback from others Uses appropriate terminology and non-verbal features to present |

| | |
|---------------------------|---|
| | information and clarify understanding |
| Numeracy | <ul style="list-style-type: none">Analyses numerical information to determine employees' remuneration packagesMakes basic calculations to ensure work output is delivered in a timely manner |
| Initiative and enterprise | <ul style="list-style-type: none">Develops or updates organisational policies to meet organisational objectivesConsiders own role in terms of its contribution to broader goals of work environmentAnalyses outcomes of decisions to identify improvement opportunitiesSeeks expert advice and skills training, where required |
| Teamwork | <ul style="list-style-type: none">Considers whether and how often others should be involved, using consultative or collaborative processes as an integral part of the decision-making process |
| Planning and organising | <ul style="list-style-type: none">Plans and implements tasks required to deliver timely outcomes, negotiating some key aspects with othersMonitors implementation of plans and adjusts as necessary |

Unit Mapping Information

Supersedes and is equivalent to BSBHRM506 Manage recruitment selection and induction processes.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM525 Manage recruitment and onboarding

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage the recruitment and onboarding process for two different individuals.

In the course of the above, the candidate must:

- update organisational policies and procedures for recruitment and onboarding
- identify the need for recruitment
- prepare and oversee appropriate documentation required for recruitment
- select and advise job applicants appropriately
- manage the onboarding process
- comply with relevant legislation and organisational requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of recruitment, selection and onboarding policies and procedures
- common recruitment and selection methods
- relevant legislation, regulations, standards and codes of practice that may affect recruitment and onboarding
- key features of psychometric and skills testing programs for recruitment
- key components of contracts of employment.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- relevant organisational policies and procedures
- relevant legislation, regulations and codes of practice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM526 Manage payroll

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish and monitor security procedures for managing organisational payroll services and to calculate and process salary payments, group taxation and related payments.

The unit applies to individuals, employed in a range of work environments, who are required to establish and work with payroll systems and may have responsibility for managing payroll systems and calculations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish procedures for payroll management | 1.1 Ensure the confidentiality and security of payroll information 1.2 Ensure procedures guarantee substantiation of claims for allowances 1.3 Safeguard organisation's financial resources according to legislative and organisational requirements 1.4 Establish systems to ensure statutory obligations are met and records are kept for the period determined by government legislation |
| 2. Prepare payroll data | 2.1 Calculate gross pay and annual salaries 2.2 Calculate statutory and voluntary deductions using government |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|---|
| | and employee documentation 2.3 Provide payroll data to payroll processor for calculation within designated timelines |
| 3. Authorise payment of salaries | 3.1 Check payroll, and authorise salaries and wages for payment according to organisational policy and procedures 3.2 Reconcile salaries, wages and deductions according to organisational policy and procedures 3.3 Handle salary, wage and related enquiries according to organisational policy and procedures |
| 4. Administer salary records | 4.1 Process declaration forms for new and existing employees according to Australian Taxation Office requirements 4.2 Forward periodic deductions to nominated creditors within designated timelines 4.3 Prepare and dispatch payments to government authorities accurately and according to relevant government legislation 4.4 Calculate and transcribe group tax amounts and make payments according to taxation procedures 4.5 Prepare and reconcile employee group certificate amounts from salary records |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from organisational policies, legislative and industry-related material |
| Writing | <ul style="list-style-type: none"> Records data accurately using relevant format, style and language suited to context and audience Prepares specific information which clearly conveys an understanding of outcomes and uses appropriate terminology to present to relevant stakeholder |
| Oral Communication | <ul style="list-style-type: none"> Articulates information concisely using appropriate terminology, tone and style Uses questioning and listening techniques to exchange and clarify information |
| Numeracy | <ul style="list-style-type: none"> Uses a wide range of mathematical calculations to analyse and compare numerical information Makes calculations to ensure work is completed according to |

| | |
|---------------------------|--|
| | predetermined deadlines |
| Initiative and enterprise | <ul style="list-style-type: none">• Recognises and applies the protocols governing what to communicate with who, and how, in a range of work contexts |
| Self-management | <ul style="list-style-type: none">• Uses logical processes in planning, implementing and evaluating routine and non-routine tasks in achieving goals and timelines• Understands the importance of secure information and privacy in relation to own work and takes responsibility for identifying and managing risk factors |
| Problem solving | <ul style="list-style-type: none">• Uses analytical skills to identify discrepancies and attempts to resolve the issues within the context of own responsibilities• Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account |

Unit Mapping Information

Supersedes and is equivalent to BSBFIM502 Manage payroll.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM526 Manage payroll

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least one occasion establish procedures for payroll management
- on at least two occasions prepare payroll, authorise payment and administer salary records.

In the course of the above, the candidate must:

- document steps undertaken to establish payroll system
- use data and calculations to reconcile salaries, wages and deductions according to all legislative and organisational requirements
- create accurate payroll management records.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, standards, regulations and codes of practice that may affect aspects of payroll operations
- key features of policies and procedures relevant to payroll processes
- key methods of calculating gross pay and annual salary using nominal awards, contracts and government legislation
- processes associated with Single Touch Payroll (STP).

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources relevant to performance evidence
- relevant organisational policies and procedures

- organisational financial data
- payroll system.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM527 Coordinate human resource functions and processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate human resource functions and processes, integrating business ethics.

The unit applies to individuals with responsibility for coordinating a range of human resource functions and processes across an organisation. They may have staff reporting to them.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine strategies for delivery of human resource functions and processes | <ul style="list-style-type: none">1.1 Analyse business strategy and operational plans and determine human resource requirements1.2 Review external business environment and likely impact on organisation's human resource requirements1.3 Consult relevant stakeholders to identify relevant human resource requirements1.4 Review organisation's requirements for diversity in the workforce1.5 Develop options for delivery of human resource functions and processes that comply with legislative requirements, organisational policies and business goals |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 1.6 Develop and agree on strategies and action plans for delivery of human resource functions and processes 1.7 Agree and document roles and responsibilities of human resource team, line managers, and external contractors 1.8 Coordinate systems for gathering and storing information needed to provide human resource functions and processes |
| 2. Coordinate the delivery of human resource functions and processes | 2.1 Communicate information about human resource strategies, functions and processes to internal and external stakeholders 2.2 Negotiate service agreements with the human resource team, service providers and client groups 2.3 Document and communicate human resources requirements, performance standards and timeframes 2.4 Identify and coordinate relevant support, where required 2.5 Agree and coordinate monitoring of relevant quality assurance processes for human resource functions 2.6 Ensure that functions and processes are delivered by appropriate providers, according to organisation policies and procedures 2.7 Identify and rectify underperformance of human resource team or service providers |
| 3. Evaluate human resource functions and processes | 3.1 Coordinate survey of clients to determine level of satisfaction 3.2 Collect client feedback and use in review processes 3.3 Recommend changes to human resource functions and processes 3.4 Obtain approvals to variations in service delivery from relevant managers 3.5 Support agreed change processes across the organisation |
| 4. Coordinate integration of business ethics in human resource practices | 4.1 Ensure code of conduct is observed across the organisation, and its expectations are incorporated in human resource policies and practices 4.2 Identify confidentiality requirements in dealing with all human resource information 4.3 Handle unethical behaviour according to organisational policies and procedures 4.4 Ensure all persons responsible for human resource functions understand requirements regarding their ethical behaviour |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none">Critically evaluates and applies content from a range of structurally complex texts |
| Writing | <ul style="list-style-type: none">Develops a range of documentation using tone, structure and language suited to context and audience |
| Oral Communication | <ul style="list-style-type: none">Asks questions to gather information and listens carefully to evaluate informationUses appropriate vocabulary and tone in negotiations |
| Numeracy | <ul style="list-style-type: none">Makes basic calculations to ensure work output meets predetermined timeframesSelects from an expanding range of mathematical strategies when analysing investment policies |
| Self-management | <ul style="list-style-type: none">Appreciates the implications of ethical, legal and regulatory responsibilities related to own workConsiders own role in terms of its contribution to broader goals of the work environment |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBHRM501 Manage human resource services
- BSBHRM510 Manage mediation processes
- BSBHRM511 Manage expatriate staff.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM527 Coordinate human resource functions and processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- coordinate human resource functions and processes for an organisation or work area within legislative, organisational and business ethical frameworks.

In the course of the above, the candidate must:

- communicate effectively with a range of relevant stakeholders at various levels of seniority
- identify and arrange training support where appropriate
- calculate human resource return on investment within the organisation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legal and compliance requirements that apply to managing human resources
- relevant legislative requirements and organisational policies and procedures
- relevant business ethical frameworks
- key features of human resource strategies and planning processes and their relationship to business and operational plans
- key methods of performance and contract management
- how feedback can be used to modify the delivery of human resources.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business strategy and operation plans

- legislation, regulations and codes of practice relevant to human resources processes.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM528 Coordinate remuneration and employee benefits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate an organisation's remuneration and benefits plans. It incorporates all functions associated with remuneration, including packaging, salary benchmarking, market rate reviews, bonuses and the legislative aspects of remuneration and employee benefits.

The unit applies to individuals who are human resource practitioners responsible for overseeing an organisation's remuneration process.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Update organisation's remuneration strategy | 1.1 Identify the scope of remuneration and benefits plans in consultation with relevant stakeholders 1.2 Research current practice, recent developments and legislative parameters for remuneration strategy 1.3 Develop and refer remuneration and employee benefits options for consideration by relevant stakeholders 1.4 Assist in presenting options and describing link to organisational strategic objectives 1.5 Record agreed remuneration policies and incentive plans |
| 2. Coordinate | 2.1 Determine occupational groups that are industrial agreement |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| remuneration and employee benefits strategy | <p>based</p> <p>2.2 Ensure organisation is competitive in its particular occupational group</p> <p>2.3 Align remuneration and benefits plans with performance management system</p> <p>2.4 Ensure remuneration and employee benefits are according to legal requirements and organisational policies and procedures</p> <p>2.5 Ensure incentive arrangements, if relevant, comply with the organisation's remuneration strategy</p> |
| 3. Review and update remuneration strategy | <p>3.1 Consult managers and employees about the effectiveness of the remuneration strategy</p> <p>3.2 Amend strategy and plans as necessary to meet organisational policies and legal requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types |
| Writing | <ul style="list-style-type: none"> Develops complex material for specific audiences using clear language and appropriate structure to convey explicit information, requirements and recommendations |
| Oral Communication | <ul style="list-style-type: none"> Draws on a repertoire of open questioning and active listening skills when consulting others Uses appropriate terminology and non-verbal features to present information or clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Analyses numerical information to determine employee remuneration and benefits according to a clear set of parameters |
| Initiative and enterprise | <ul style="list-style-type: none"> Adheres to relevant organisational policies, procedures and legislative requirements |
| Teamwork | <ul style="list-style-type: none"> Uses effective presentation and collaboration skills to show options, negotiate agreement and gain feedback on policies |
| Self-management | <ul style="list-style-type: none"> Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others, taking into account capabilities, efficiencies and effectiveness Applies systematic and analytical processes to determine appropriate |

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|--|--|
| | models of remuneration and benefits for particular occupational groups and individuals |
|--|--|

Unit Mapping Information

Supersedes and is equivalent to BSBHRM505 Manage remuneration and employee benefits.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM528 Coordinate remuneration and employee benefits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop a remuneration strategy for at least two different occupational groups.

In the course of the above, the candidate must:

- manage remuneration and benefits according to all legislative and ethical requirements and operational policies
- apply awards and agreements to remuneration processes
- apply requirements of the Australian Taxation Office in relation to income tax, superannuation reporting, fringe benefits tax (FBT) and bonus payments.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- remuneration principles or models and approaches
- ethical practices relating to remuneration and benefits strategies
- common remuneration or employee benefits
- ways to position an organisation to be an 'employer of choice'
- relevant industrial agreements
- organisational policies and procedures affecting remuneration strategies
- relevant legislation, regulations and standards that may affect remuneration strategies
- relevant business ethical requirements
- requirements of the Australian Taxation Office in relation to:
 - income tax
 - superannuation reporting
 - FBT and bonus payments.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- relevant organisational policies and procedures
- relevant legislation, regulations and codes of practice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM529 Coordinate separation and termination processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate redeployment, resignation, retirement, dismissal and redundancy, including the conduct of exit interviews.

The unit applies to individuals who take responsibility for overseeing aspects of managing the voluntary and involuntary termination of employment.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assist development of policies and procedures | 1.1 Research features of best practice systems of separation and termination and the legal requirements 1.2 Consult relevant stakeholders prior to introduction of new policies, procedures and supporting documentation 1.3 Assist in determining policies, procedures and supporting documentation for all forms of separation and termination 1.4 Ensure procedures for dismissal or termination are according to legislative requirements and organisational policies and procedures 1.5 Obtain support for separation and termination policies and procedures from relevant stakeholders 1.6 Communicate policies and procedures, and provide supporting |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | documents to relevant stakeholders 1.7 Seek and use feedback to refine policies, procedures and supporting documents for separation and termination |
| 2. Coordinate separation and termination | 2.1 Facilitate the development of a redundancy or redeployment plan 2.2 Coordinate management of redundancies and redeployment and provide relevant information about processes 2.3 Provide outplacement or other assistance according to organisational policies and legal requirements 2.4 Ensure dismissals for incapacity to perform or misconduct comply with legislative requirements and organisational policies and procedures 2.5 Ensure human resource staff, managers and supervisors have necessary skills and knowledge to take disciplinary action 2.6 Review workforce data for predicted numbers of people retiring and make necessary plans 2.7 Review and evaluate separation and termination procedures and suggest improvements |
| 3. Coordinate exit interview process | 3.1 Provide separating employees opportunity to participate in exit interviews 3.2 Create clear process for exit interviews and that staff are skilled to conduct them 3.3 Record and depersonalise data from exit interviews 3.4 Establish trends and patterns and suggest improvements across the organisation according to data from exit interviews |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|----------|--|
| Learning | <ul style="list-style-type: none"> Ensures staff have necessary skills and training to oversee employee terminations |
| Reading | <ul style="list-style-type: none"> Critically evaluates and applies content from a range of texts to determine legislative and business requirements |
| Writing | <ul style="list-style-type: none"> Uses a range of writing skills and techniques to create or edit organisational documentation in required format for a range of audiences |

| | |
|---------------------------|--|
| | <ul style="list-style-type: none">• Creates records in required format and structure |
| Oral Communication | <ul style="list-style-type: none">• Uses appropriate terminology and non-verbal features when consulting others and presenting information• Uses open questioning and active listening skills when seeking feedback from others |
| Numeracy | <ul style="list-style-type: none">• Undertakes basic mathematical calculations to review and manipulate workforce data |
| Initiative and enterprise | <ul style="list-style-type: none">• Identifies and adheres to legislative and organisational requirements relevant to role• Develops or updates policies and procedures to achieve organisational goals• Monitors adherence to organisational policies and procedures |
| Teamwork | <ul style="list-style-type: none">• Collaborates with others to achieve outcomes, playing an active role in facilitating understanding of procedures |
| Problem solving | <ul style="list-style-type: none">• Plans and implements tasks to achieve outcomes according to legislative and organisational requirements• Uses systematic processes to gather and analyse the data needed to make decisions that affect the organisation• Uses consultation and analytical thinking to decide on improvements to work practices and processes |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBHRM507 Manage separation or termination.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM529 Coordinate separation and termination processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- assist development of at least three different policies and procedures to manage all aspects of employment separation and termination according to legislative and organisational requirements
- on at least one occasion, coordinate the separation or termination of an employee.

In the course of the above, the candidate must:

- communicate effectively with employees to ensure they are aware of their rights and responsibilities
- ensure staff have an appropriate skill-sets to conduct terminations
- use data from exit interviews to suggest organisational improvements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key aspects of disciplinary procedures
- key features of employment contracts including terms and conditions
- relevant procedures and grounds for dismissal, suspension, voluntary termination, retirement and redundancy
- relevant industrial relations and employee dismissal legislation
- methods of obtaining feedback and suggesting improvements to organisational operations.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- relevant organisational policies and procedures
- relevant legislation, regulations and codes of practice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM530 Coordinate rehabilitation and return to work programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate Workers' Compensation and sick leave claims. It also covers the coordination of rehabilitation needs and return to work programs and their monitoring, review and evaluation.

The unit applies to individuals who coordinate claims and ensure that the organisation provides appropriate support for the worker.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Coordinate claims | <ul style="list-style-type: none">1.1 Ensure that the organisation has and maintains a current Workers' Compensation insurance policy according to required legislation1.2 Process claims according to organisational policies, procedures and legal and insurance requirements1.3 Notify rehabilitation provider according to organisational policies and procedures1.4 Advise claimants as to whether their claim has been accepted, where required1.5 Analyse claims to identify the nature of the illness and prepare |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | <p>required reports</p> <p>1.6 Identify projected period of absence and where rehabilitation assistance is required and ensure arrangements are made in the work team to deal with absence</p> |
| 2. Coordinate rehabilitation or return to work process | <p>2.1 Ensure consultation occurs between rehabilitation provider and treating doctor, relevant managers and employee</p> <p>2.2 Coordinate job redesign, reduced hours and alternative according to medical advice</p> <p>2.3 Design a return to work program</p> <p>2.4 Obtain approval for return to work program by relevant managers</p> <p>2.5 Coordinate return to work program with employee</p> <p>2.6 Coordinate risk analysis in relation to proposed program and mitigate risk where appropriate</p> <p>2.7 Commence program as close to the time of the accident or illness, as possible</p> |
| 3. Monitor rehabilitation return to work program | <p>3.1 Encourage regular communication between provider, supervising manager and employee</p> <p>3.2 Coordinate regular contact and support between provider and employee</p> <p>3.3 Identify breaches of the return to work program and suggest remedial action</p> <p>3.4 Refer return to work program to workers compensation authorities where breaches occur</p> <p>3.5 Modify return to work program, where required</p> <p>3.6 Evaluate each rehabilitation or return to work program at its conclusion and suggest recommendations for system improvement</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types |
| Writing | <ul style="list-style-type: none"> Records results of analysis in required formats Prepares correspondence to a range of individual in required format Uses vocabulary, grammatical structure and appropriate organisational |

| | |
|---------------------------|--|
| | conventions to ensure rehabilitation and return to work programs are effectively documented |
| Oral Communication | <ul style="list-style-type: none"> • Uses appropriate vocabulary and non-verbal features in discussions with employees, insurance companies and rehabilitation providers when dealing with claims |
| Numeracy | <ul style="list-style-type: none"> • Uses basic numeracy skills to determine the appropriate amount of hours for a return to work program • Selects and uses appropriate mathematical problem-solving strategies to undertake risk analysis and to evaluate the rehabilitation program |
| Initiative and enterprise | <ul style="list-style-type: none"> • Ensures knowledge of legislative requirements and products is kept up to date in order to provide accurate information • Takes responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulation • Seeks to improve policies and procedures to better meet organisational goals |
| Problem solving | <ul style="list-style-type: none"> • Implements strategies to discuss health matters sensitively with a range of people • Makes critical decisions in complex situations, taking a range of variables into consideration |
| Planning and organising | <ul style="list-style-type: none"> • Plans and organises complex tasks to ensure that that claims are properly processed and to keep the claimant informed • Monitors progress of plans and schedules and reviews and changes them to meet new demands and priorities |

Unit Mapping Information

Supersedes and is equivalent to BSBHRM509 Manage rehabilitation or return to work programs.

Links

Companion Volume Implementation Guide is found on VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM530 Coordinate rehabilitation and return to work programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions process a workers compensation claim
- on at least two occasions coordinate the rehabilitation or return to work process for an individual.

In the course of the above, the candidate must:

- process sick leave claims
- coordinate rehabilitation needs and return to work program including
 - identifying breaches
 - liaising between the claimant, workers compensation authority, rehabilitation provider, doctor and workplace
 - determining the extent to which the program meets its objective in respect to timeframes, success rates, cost and impact on the organisation
- assist in conducting a risk analysis of a return to work program and mitigate identified risks including
- apply relevant legislation to return to work programs.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key aspects of rehabilitation concepts and return to work procedures
- relevant legislation from all levels of government that affects rehabilitation and return to work programs
- role of Workers' Compensation authorities and tribunal procedures
- methods to process claims.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- relevant workplace policies and procedures
- relevant legislation, regulations and codes of practice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM531 Coordinate health and wellness programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate programs with a health and wellbeing focus. The unit addresses coordination of the range of programs that would typically be associated with health and wellbeing such as stress management, smoking cessation, exercise and Employee Assistance Programs (EAPs).

The unit applies to individuals who take responsibility for managing staff health and wellness programs or activities.

It also has particular relevance for managers of human resources or diversity programs, frontline managers and specialist consultants responsible for promoting a balance between work demands and personal life. The individual may not be directly involved in delivering the programs.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Research and analyse employee health issues | 1.1 Identify and collect information on employee health issues from relevant sources 1.2 Review findings and their implications for the organisation and business objectives 1.3 Consult relevant stakeholders and develop options for addressing identified health issues |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|--|
| | 1.4 Agree preferred options with required stakeholders |
| 2. Plan health and wellness program | 2.1 Develop program scope and objectives in consultation with relevant industry consultants, colleagues and managers 2.2 Plan and create administrative structures and resources for program 2.3 Establish program responsibilities and clearly communicate to all stakeholders 2.4 Consult relevant stakeholders and plan communications and marketing strategies 2.5 Establish evaluation methods, develop a program management plan and communicate this plan to stakeholders |
| 3. Coordinate program | 3.1 Prepare policy documents and coordinate strategies in conjunction with program team members 3.2 Coordinate support, assistance and mentorship to relevant stakeholders 3.3 Monitor tracking systems according to program guidelines 3.4 Reach program milestones according to program management plan and provide regular progress reports to stakeholders |
| 4. Evaluate and improve program | 4.1 Use agreed evaluation methods to assess effectiveness of program at specific stages 4.2 Communicate information from program evaluation process to stakeholders 4.3 Incorporate evaluation process and outcomes into continuous improvement strategies, enterprise agreements and future corporate plans |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Compares and contrasts information and demonstrates an understanding gained from a variety of sources such as marketing and communication plans |
| Writing | <ul style="list-style-type: none"> Integrates information from a number of sources and develops content using clear language that supports the purpose and context |
| Oral Communication | <ul style="list-style-type: none"> Applies appropriate strategies to communicate main ideas in a range of contexts, and listening and questioning techniques to confirm understanding |

| | |
|---------------------------|---|
| Initiative and enterprise | <ul style="list-style-type: none">• Recognises, responds and contributes to organisational procedures and protocols |
| Teamwork | <ul style="list-style-type: none">• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role• Recognises importance of building rapport to establish effective working relationships |
| Problem solving | <ul style="list-style-type: none">• Uses logical processes, and an increasingly intuitive understanding of context, to plan, organise, implement and monitor programs• Systematically gathers and analyses all relevant information and evaluates options to make informed decisions• Evaluates outcomes of decisions to identify opportunities for improvement |

Unit Mapping Information

Supersedes and is equivalent to BSBLED502 Manage programs that promote personal effectiveness.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM531 Coordinate health and wellness programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan, implement and coordinate a health and wellness program for an organisation or work area.

In the course of the above, the candidate must:

- collaboratively develop an overall program management plan
- prepare policy documents
- coordinate required support to relevant stakeholders
- evaluate implementation and incorporate evaluation outcomes into organisational strategies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of a range of employee health issues and options for improving health outcomes
- sources of specialist advice
- key steps to create a program management plan
- communications and marketing strategies for health and wellness programs
- methods for monitoring and evaluating program progress and impact.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM611 Contribute to organisational performance development

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to contribute to organisational performance development, through contribution to planning, development and coordination of performance development programs.

The unit applies to individuals who contribute to planning, developing, coordinating, monitoring and evaluating organisational performance development. The program should develop and use tools that enhance learning. The program should be monitored and evaluated to ensure it explores and meets relevant stakeholder's learning needs.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to planning of organisational performance development | 1.1 Determine benefits of, and need for, organisational performance development 1.2 Define organisational performance development program purpose and objectives 1.3 Develop organisational performance development program plan with appropriate outcomes, in consultation with key stakeholders 1.4 Establish relevant management structures and wider support |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>requirements</p> <p>1.5 Determine organisational performance development program modes and methods</p> <p>1.6 Determine methods and resources required to report organisational performance development program outcomes</p> <p>1.7 Develop means to report and collate outcomes of organisational performance development</p> |
| 2. Contribute to development of program tools and materials | <p>2.1 Develop range of tools and resources according to organisational performance development program modes and methods</p> <p>2.2 Establish organisational performance development procedures</p> <p>2.3 Establish procedures and requirements encompassing key accountabilities and responsibilities</p> |
| 3. Facilitate organisational performance development | <p>3.1 Ensure plans required for personal growth are developed by relevant stakeholders</p> <p>3.2 Consider and address cultural differences and diversity issues in all organisational performance development communications</p> <p>3.3 Use data and reporting tools and monitor organisational performance development</p> |
| 4. Evaluate organisational performance development program | <p>4.1 Complete organisational performance development record-keeping and reporting requirements according to organisational policies and procedures</p> <p>4.2 Evaluate organisational performance development program against agreed outcomes and report through relevant management structures</p> <p>4.3 Document improvement opportunities for future organisational performance development programs based on program evaluation</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|--|
| Reading | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be used to meet requirements |
| Writing | <ul style="list-style-type: none"> Communicates complex relationships between ideas and information by creating reports Documents results of organisation performance program using required |

| | |
|-------------------------|--|
| | organisational formats |
| Oral Communication | <ul style="list-style-type: none">• Uses appropriate language to provide information and encourage discussions• Applies listening and questioning techniques to check and confirm understanding |
| Self-management | <ul style="list-style-type: none">• Adheres to organisational policies and procedures |
| Planning and organising | <ul style="list-style-type: none">• Identifies and analyses issues to aid in decisions about appropriate modes, methods and resources |
| Problem solving | <ul style="list-style-type: none">• Evaluates outcomes of decisions, considering results from a range of perspectives and identifying key concepts and principles that may be adaptable to future situations |
| Technology | <ul style="list-style-type: none">• Uses digital tools to store, access and organise information about the mentoring program |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBLED805 Plan and implement a mentoring program
- BSBLED806 Plan and implement a coaching strategy
- BSBLED807 Establish career development services
- BSBLED808 Conduct a career development session
- BSBLED809 Identify and communicate trends in career development
- BSBLED810 Develop human capital.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM611 Contribute to organisational performance development

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to the planning, development and coordination a of performance development program for an organisation or work area.

In the course of the above, the candidate must:

- establish a management structure
- determine support structures
- establish methods and resources to achieve designated outcomes
- develop appropriate tools and resources for organisational performance development program
- establish organisational performance development policies and procedures
- coordinate organisational performance development communications
- evaluate and document results of organisational performance development program.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- purposes and benefits of an organisational performance development program
- components of an organisational performance development program
- organisational performance development program design principles
- roles in an organisational performance development
- legislation and organisational policies relevant to organisational performance development, including confidentiality and privacy requirements
- key methods for evaluating and reporting on organisational performance development programs.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM612 Contribute to the development of employee and industrial relations strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge to contribute to the development and maintenance of a positive and productive workplace environment. It covers aspects of employee relations (ER) and industrial relations (IR) impacting on managers at the strategic level.

The unit applies to individuals who are non-specialist human resource managers and covers a broad range of ER and IR activities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to employee relations (ER) and industrial relations (IR) strategy development and policies | 1.1 Ensure ER and IR strategies are consistent with organisational strategic objectives 1.2 Contribute to development strategies and policies in consultation with relevant stakeholders 1.3 Ensure strategies and policies promote absence of discrimination and harassment 1.4 Contribute to development of risk management strategies 1.5 Identify potential areas of conflict and ensure strategies and policies are according to objectives of relevant groups and |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|--|
| | individuals |
| 2. Contribute to a productive culture | 2.1 Negotiate awards, agreements, and contracts according to organisational objectives and employee rights and obligations 2.2 Ensure conditions of employment meet legal and organisational requirements, and source external specialist advice, where required 2.3 Develop policies and practices that facilitate employee recruitment, retention and satisfaction 2.4 Provide onboarding programs and training that develop competence and confidence and ensure work is performed safely and effectively 2.5 Support employees to understand their roles 2.6 Develop, regularly review and update individual and team development plans 2.7 Evaluate and revise ER and IR policies regularly |
| 3. Resolve ER and IR problems | 3.1 Establish processes for early intervention and identify problems or grievances 3.2 Communicate problem solving processes and obtain support from relevant stakeholders 3.3 Coordinate training that develops competence in conflict management, negotiation and dispute resolution 3.4 Obtain specialist advice, where required 3.5 Ensure processes are fair, equitable and according to relevant awards agreements and legislation 3.6 Ensure problem solving processes provide for external mediation and conciliation, and arbitration, where required |
| 4. Contribute to diversity policies | 4.1 Develop plans for the promotion of diversity within the organisation in consultation with relevant stakeholders 4.2 Promote the importance of diversity and its benefits within the organisation 4.3 Develop diversity education plans 4.4 Develop and implement processes that rectify diversity issues according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets relevant information and ideas in a range of complex texts relating to ER and IR Recognises relevant information within job specifications and work processes |
| Writing | <ul style="list-style-type: none"> Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning to manage ER and IR |
| Oral Communication | <ul style="list-style-type: none"> Presents information and opinions using language and non-verbal features appropriate to audience Uses verbal and listening skills to obtain specialist advice as well as promoting diversity within the organisation |
| Numeracy | <ul style="list-style-type: none"> Selects and interprets mathematical information embedded in a range of tasks and texts |
| Self-management | <ul style="list-style-type: none"> Works autonomously making high level decisions to achieve and improve organisational goals Monitors and reviews the organisations policies, procedures and adherence to legislative requirements to implement and manage change |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with staff at various levels Influences and fosters a collaborative culture facilitating a sense of commitment and workplace cohesion Shares knowledge, information and experience openly as an integral part of the working relationship |
| Initiative and enterprise | <ul style="list-style-type: none"> Gathers and analyses data and seeks feedback to improve plans and processes |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules a range of complex activities, monitors implementation and manages relevant communication |
| Problem solving | <ul style="list-style-type: none"> Makes high impact decisions in a complex and diverse environment, using input from a range of sources Anticipates potential problems and formulates plans to deal with them, as they arise |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBHRM604 Manage employee relations.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM612 Contribute to the development of employee and industrial relations strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to developing one employee relations (ER) strategy and one industrial relations (IR) strategy.

In the course of the above, the candidate must:

- contribute to the development of an ER and IR risk management strategy
- negotiate employment awards, agreements and contracts
- maintain high standards of performance in respect to equal opportunity and the management of diversity
- manage conflict and early intervention in respect to employee grievances and problems.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- common human resource specialist assistance requirements
- key principles of industrial agreements relevant to the development of ER and IR strategies organisational plans for human resource planning
- organisational policies and procedures relevant to ER and IR strategies
- key performance measurement systems
- relevant legislative and regulatory requirements
- consultation, negotiation, conflict management and dispute resolution strategies relevant to employee and industrial relations
- discrimination and the importance of diversity
- key aspects of staff development and training strategies
- organisational risk management strategies in relation to employee and industrial relations
- key aspects of organisational objectives.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents and resources relevant to performance evidence
- organisational strategic and operational plans
- workplace policies and procedures relevant to performance evidence
- legislation, regulations, codes of practice and industrial awards relevant to the business.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM613 Contribute to the development of learning and development strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to contribute to improving organisational learning, and the quality of training and assessment products and services. It covers contributing to strategy formation; designing, developing and implementing an organisational learning strategy, and reviewing and improving overall organisational learning and development.

The unit applies to individuals working in an enterprise where learning is used to build capabilities and contribute to organisational strategies, business plans, goals and values.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to learning and development strategy formation | 1.1 Evaluate methods of learning and development against organisational requirements 1.2 Analyse impact of organisational learning and development on organisation, and consult relevant stakeholders 1.3 Examine and review options for deploying quality policies and processes in organisational learning 1.4 Analyse and plan requirements for an organisational learning strategy to support organisational strategic and policy |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>requirements</p> <p>1.5 Analyse and plan technological and systems requirements for an organisational learning strategy</p> <p>1.6 Analyse and align organisational learning strategy with human resources and learning requirements and plans</p> <p>1.7 Develop procedures to liaise with educators, learners and others and monitor learning and development strategies and learning and development resources</p> |
| 2. Contribute to design of organisational learning and development strategy | <p>2.1 Design, collaboratively with relevant stakeholders, organisational learning and development strategy</p> <p>2.2 Design and develop flexible learning, development and assessment strategies to support organisational requirements</p> <p>2.3 Establish processes and procedures for allocating and managing resources and staff required to implement organisational learning strategy</p> <p>2.4 Contribute to development of compliant assessment processes according to organisational requirements</p> |
| 3. Recommend improvements to strategies | <p>3.1 Evaluate current organisational learning strategy</p> <p>3.2 Review performance of resources and people supporting organisational learning strategy</p> <p>3.3 Construct and present plans for improving organisational learning strategy</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets, analyses and evaluates a range of textual information to assist in determining and developing strategies and to manage organisational requirements |
| Writing | <ul style="list-style-type: none"> Records results of analysis using clear and comprehensible language and layout Creates a range of formal texts incorporating specific requirements in required format |
| Oral Communication | <ul style="list-style-type: none"> Uses vocabulary and features appropriate to audience when presenting information and ideas Uses listening and questioning techniques to seek opinions and confirm understanding |

| | |
|---------------------------|--|
| Initiative and enterprise | <ul style="list-style-type: none">• Takes a lead role in the development and review of organisational policies and procedures to organisational requirements• Keeps up-to-date with changes to relevant legal requirements and considers implications of these when negotiating, planning and undertaking work |
| Teamwork | <ul style="list-style-type: none">• Selects and uses appropriate communication practices to present ideas and encourage participation from all levels of stakeholder |
| Planning and organising | <ul style="list-style-type: none">• Uses logical processes, and an increasingly intuitive understanding of context, to plan, implement and review learning strategies• Plans, identifies and assembles resources required to complete tasks• Systematically gathers and analyses relevant information and evaluates options to make informed decisions• Evaluates outcomes of decisions to identify key concepts and principles that may be adaptable in future |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBLED802 Lead learning strategy implementation
- BSBLED803 Implement improved learning practice
- BSBLED804 Review enterprise e-learning systems and solutions implementation.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM613 Contribute to the development of learning and development strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to developing a learning and development strategy for at least one work area
- evaluate effectiveness of that strategy when implemented, and recommend improvements.

In the course of the above, the candidate must:

- examine and review organisational policies and procedures relevant to training and assessment
- develop consultation and communication processes to support and encourage stakeholder input into design, implementation and review of organisational learning and development strategy
- source learning resources or assessment tools, and modify, if required, to meet requirements of organisational learning strategies
- implement plans for improving organisational learning strategies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, codes of practice and national standards relevant to job role
- organisational technology and systems requirements to support an organisational learning strategy
- consultation and communication processes
- common approaches to learning strategy design
- organisational learning and development strategy design
- relevant continuous improvement processes associated with organisational learning and development strategies
- evaluation strategies
- quality management compliance requirements as it relates to organisational learning

- organisational policies and procedures relating to the development of learning and development strategies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant organisational policies and procedures
- workplace documents and resources relevant to performance evidence
- information on current training and assessment requirements.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM614 Contribute to strategic workforce planning

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to contribute to development, implementation and maintenance of a strategic approach to workforce planning in an organisation ensuring that there is the structure and staff in place to meet current and foreseeable organisational objectives.

The unit applies to individuals employed as human resource practitioners with knowledge of human resources and organisational objectives.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Research planning requirements | <ul style="list-style-type: none">1.1 Analyse strategic plans to determine strategic workforce direction, objectives and targets1.2 Analyse organisational environment and identify emerging practices and trends that may impact on human resource management in the organisation1.3 Identify future labour needs, skill requirements and sources of labour supply1.4 Identify new technology and its impact on job roles and job design1.5 Review recent and potential changes to industrial and legal |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | requirements |
| 2. Contribute to development of strategic workforce plan | 2.1 Consult relevant managers about their workforce preferences 2.2 Agree on workforce philosophies, values and policies with relevant managers 2.3 Develop strategic objectives and targets for workforce services 2.4 Examine options for the provision of workforce services and analyse costs and benefits 2.5 Identify appropriate technology and systems to support agreed workforce programs and practices 2.6 Contribute input from consultation into strategic workforce plan and obtain senior management support for plan 2.7 Analyse risks associated with strategic workforce plan and develop risk mitigation strategies |
| 3. Support implementation of strategic workforce plan | 3.1 Work with relevant stakeholders and ensure that plan is implemented according to organisational objectives 3.2 Monitor and review the plan 3.3 Recommend adaptations to plan to account for changing circumstances 3.4 Evaluate and review performance against plan objectives |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Organises, evaluates and applies content from a range of structurally complex texts relating to human resource strategic planning |
| Writing | <ul style="list-style-type: none"> Communicates complex ideas relating to strategic objectives, matching style of writing to purpose and audience |
| Oral Communication | <ul style="list-style-type: none"> Establishes and maintains complex and effective spoken communications in a broad range of contexts with relevant managers to determine resources preferences, philosophies and values |
| Numeracy | <ul style="list-style-type: none"> Selects and interprets mathematical information that may be embedded in a range of tasks and texts to analyse costs and benefits |
| Initiative and enterprise | <ul style="list-style-type: none"> Ensures knowledge of legislative requirements and products is current and accurate Develops and implements strategies that ensure organisational policies, procedures and regulatory requirements are being met |

| | |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Selects and uses appropriate conventions and protocols when communicating with managers at various levels• Participates in conversations relevant to role responding, explaining, negotiating and persuading, as required• Sequences and schedules complex activities, monitors implementation and manages relevant communication when developing the strategic plan |
| Problem solving | <ul style="list-style-type: none">• Makes a range of critical and non-critical decisions in relatively complex situations, analysing data and taking a range of factors into account when researching planning requirements and developing the plan• Gathers and analyses data and seeks feedback to improve plans and processes |
| Technology | <ul style="list-style-type: none">• Uses digital technologies and actively investigates new technologies for strategic and operational purposes |

Unit Mapping Information

Supersedes and is equivalent to BSBHRM602 Manage human resources strategic planning.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM614 Contribute to strategic workforce planning

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to the development and implementation of at least one strategic workforce plan.

In the course of the above, the candidate must:

- analyse information from a range of internal and external sources to determine:
 - workforce strategic direction, objectives and targets
 - trends and emerging practices that may have an impact on workforce
 - relevant technology
 - recent and potential changes to industrial and legal requirements
 - future labour needs and skills requirements
 - options for sourcing labour
 - organisation's preferences regarding workforce
- consult relevant stakeholders and collaboratively develop, implement, monitor and review a strategic workforce plan including:
 - budget
 - priorities
 - agreed objectives, targets, programs and practices based on cost-benefit analysis
 - timeframes
 - risk management
 - evaluation against objectives.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- human resource practices and functions
- relevant legislative, regulatory and industrial requirements for the organisation

- common options for sourcing labour
- impact of technology on job roles in the organisation or work area
- options for sourcing labour supply
- risk management plans to support the strategic workforce planning
- format and features of a strategic workforce plan
- modern philosophies, values and policies applicable to the human resources profession.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents and resources relevant to performance evidence
- relevant legislation, regulations and codes of practice
- business strategic and operational plan
- relevant workplace policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBHRM615 Contribute to the development of diversity and inclusion strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to contribute to the development of diversity and inclusion strategies for an organisation. This includes developing objectives and strategies as well as monitoring and evaluating trends and processes.

It focuses on making provision for inclusivity to ensure that training, employment and promotional opportunities are provided to all cohorts to actively leverage diversity in the workplace.

The unit applies to individuals who assess factors that may affect the supply of workers; align workforce objectives with organisational plans; and design strategies to ensure a competent, diverse and inclusive workforce is available to meet anticipated changes.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Human Resources

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Research opportunities for workforce diversity | 1.1 Review current organisational practices for recruiting, training, and promoting staff 1.2 Review current data on staff turnover, workforce demographics and local, regional and international population demographics 1.3 Identify and assess factors that affect current and future supply of workers |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 1.4 Assess opportunities for diversity within the organisation 1.5 Provide recommendations that support valuing and leveraging diversity to improve organisational practices and meet regulatory requirements |
| 2. Develop diversity and inclusion strategies in collaboration with others | 2.1 Confirm objectives to enhance diversity and inclusion within organisation with required stakeholders 2.2 Consult and establish management strategies that support valuing and leveraging diversity and inclusion 2.3 Communicate objectives and rationale to relevant stakeholders 2.4 Obtain agreement and endorsement for diversity and inclusion objectives and collaboratively establish targets 2.5 Contribute to development of required contingency strategies |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Sources, evaluates and critiques ideas and information from a range of complex texts to assist with decisions, change management, and management of organisational requirements Monitors reported information to evaluate progress of workforce diversity progress |
| Writing | <ul style="list-style-type: none"> Records insights and results of analysis using clear, concise language Researches and prepares plans for relevant stakeholders incorporating appropriate vocabulary grammatical structure and conventions |
| Oral Communication | <ul style="list-style-type: none"> Presents information using language and non-verbal features appropriate to audience |
| Self-management | <ul style="list-style-type: none"> Works autonomously making high level decisions to achieve and improve organisational goals |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with stakeholders in a range of work contexts |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage complex activities with strategic implications |
| Problem solving | <ul style="list-style-type: none"> Coordinates and analyses all relevant information to inform decisions with the potential to affect organisational outcomes |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBDIV801 Conduct strategic diversity workforce planning
- BSBDIV802 Conduct strategic planning for diversity learning practices.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBHRM615 Contribute to the development of diversity and inclusion strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to developing a diversity and inclusion strategy for at least one work area
- evaluate effectiveness of that strategy when implemented, and recommend improvements.

In the course of the above, the candidate must:

- research opportunities for workforce diversity and inclusion
- develop organisational workforce diversity and inclusion objectives and strategies
- critically analyse existing organisational workforce diversity and inclusion objectives with evaluation of their effectiveness and recommendations for improvement.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational workforce diversity and inclusion policies including:
 - regulatory requirements
 - rationale for workforce diversity within an organisation
 - policies that promote the leveraging of diversity
 - issues that can be linked to diversity
- strategies that support leveraging organisational diversity and inclusion
- common planning methodologies
- workforce trends affecting workforce planning methodologies
- diversity characteristics including:
 - cultural background and ethnicity
 - age
 - gender and gender identity
 - ability

- sexual orientation
- religious belief
- language
- education.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents and resources relevant to performance evidence
- relevant legislation, regulations and codes of practice
- relevant organisational records, policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS201 Process and maintain workplace information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to receive, process, and store workplace information and maintain information systems. It also includes the maintenance of records management systems.

The unit applies to individuals who perform a variety of routine tasks in the workplace, using a limited range of practical skills and fundamental knowledge of information and information systems in a defined context, under direct supervision or with limited individual responsibility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Collect information | 1.1 Confirm task requirements 1.2 Collect physical and digital information items 1.3 Allocate time and date of receipt to relevant information items 1.4 Apply organisational policies and procedures relating to security and confidentiality in handling information |
| 2. Process workplace information | 2.1 Enter metadata applying to information items into relevant system according to organisational policies and procedures 2.2 Collate and distribute information according to task requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|--|
| 3. Manage information systems | 3.1 Maintain information and relevant classification system according to organisational policies and procedures 3.2 Identify and dispose of inactive unpublished information items or deaccession published information items according to organisational policies and procedures 3.3 Create new files of unpublished information materials according to organisational policies and procedures 3.4 Update registration, accessioning, classification and index systems according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Recognises and interprets textual information to complete tasks according to organisational policies and procedures |
| Writing | <ul style="list-style-type: none"> Records simple and routine content using an established format to organise information |
| Oral Communication | <ul style="list-style-type: none"> Uses listening and questioning skills to clarify and adhere to requirements |
| Numeracy | <ul style="list-style-type: none"> Comprehends basic mathematical measurements relating to times and number sequences |
| Self-management | <ul style="list-style-type: none"> Follows clearly defined instructions and monitors own progress to achieve timelines |
| Technology | <ul style="list-style-type: none"> Uses digital technologies regarding data entry and retrieval |

Unit Mapping Information

Supersedes and is equivalent to BSBINM201 Process and maintain workplace information.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS201 Process and maintain workplace information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- receive and process three pieces of workplace information according to organisational policies and procedures.

In the course of the above, the candidate must:

- record and document information accurately
- store, classify and maintain information materials.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures relating to collecting and processing workplace information
- key aspects of organisational information items management systems and security and confidentiality procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of workplace information systems.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS202 Handle receipt and dispatch of information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to receive and distribute incoming information, and to collect and despatch outgoing information using both digital and non-digital methods.

The unit applies to those who perform a range of routine tasks in the workplace, using a limited range of technological and practical skills and knowledge of information handling under direct supervision or with limited individual responsibility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Receive and distribute incoming information | <ul style="list-style-type: none">1.1 Collect physical and digital information items from organisation's points of receipt1.2 Destroy items of no relevance to organisation according to organisational policies and procedures1.3 Annotate each relevant item with time and date of receipt, where required1.4 Enter metadata applying to information items into relevant system according to organisational policies and procedures, where required1.5 Identify urgent and confidential information for priority |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | distribution 1.6 Sort and deliver information items to relevant stakeholders according to organisational policies and procedures 1.7 Record damaged, suspicious or missing items and report to relevant stakeholders, where required |
| 2. Receive and despatch outgoing information | 2.1 Collect, check and sort outgoing information items according to organisational policies and procedures 2.2 Record and process outgoing information items for despatch according to organisational policies and procedures 2.3 Prepare items for urgent delivery according to organisational policies and procedures 2.4 Organise despatch of urgent deliveries and follow up if necessary 2.5 Despatch remaining information according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none">Identifies familiar information from a range of sources, compares it against defined criteria and requirements, and checks for accuracy and completeness |
| Writing | <ul style="list-style-type: none">Records information and completes organisational documents and correspondence using clear language and correct spelling, grammar and terminology |
| Oral Communication | <ul style="list-style-type: none">Participates in spoken interactions with others using clear and direct language to convey and clarify information |
| Numeracy | <ul style="list-style-type: none">Performs basic calculations to check and confirm numerical information and estimate time requirements |
| Problem solving | <ul style="list-style-type: none">Responds to predictable routine problems, implementing standard or logical solutions |
| Planning and organising | <ul style="list-style-type: none">Plans and implements routine tasks and workload, and follows instructions to set priorities |
| Self-management | <ul style="list-style-type: none">Understands own role and associated responsibilities for task completion in compliance with organisational policies and procedures |

| Skill | Description |
|------------|---|
| Technology | <ul style="list-style-type: none">• Uses digital tools for basic reading, recording, searching and communicating information following routine procedures |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBINM202 Handle mail
- BSBINM303 Handle receipt and despatch of information.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS202 Handle receipt and dispatch of information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- receive and distribute incoming information according to organisational policies and procedures, on at least two occasions
- despatch and register outgoing information according to organisational policies and procedures, on at least two occasions.

In the course of the above, the candidate must:

- check all details routinely, including addresses, numerical information, and spelling
- seek clarification from relevant stakeholders and apply correct addressing protocols for despatch.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures relating to receipt and despatch of information
- roles and locations of relevant organisational personnel
- key aspects of organisational information items management systems and security and confidentiality procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- samples of information.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS203 Assist with circulation services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to process loan transactions and respond to circulation and lending enquiries from customers.

The unit applies to individuals working under supervision within established organisational policies and procedures, in frontline library and information services roles.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Provide information to customers | 1.1 Use circulation and lending systems and procedures and provide current and accurate information to customers 1.2 Assist relevant stakeholders with basic enquiries 1.3 Explain use of self-service systems in libraries 1.4 Respond to customer enquiries or refer to relevant stakeholder |
| 2. Process loan transactions | 2.1 Check and process customer registration details according to organisational policies and procedures 2.2 Complete transactions according to organisational policies and procedures 2.3 Prioritise competing demands for service 2.4 Complete checking and processing of material according to |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | organisational policies and procedures |
| 3. Identify and escalate irregularities | 3.1 Identify irregularities in transactions 3.2 Consult with relevant stakeholders and escalate issues, where required |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets, consolidates and checks completeness and accuracy of information |
| Writing | <ul style="list-style-type: none"> Uses simple vocabulary, grammatical structures and conventions |
| Oral Communication | <ul style="list-style-type: none"> Selects and uses appropriate words to establish and maintain effective spoken communication with customers and colleagues |
| Self-management | <ul style="list-style-type: none"> Understands roles and responsibilities and makes basic decisions on work completion parameters |
| Problem solving | <ul style="list-style-type: none"> Makes low-impact decisions around immediate, clearly defined tasks Implements standard procedures for routine decisions in response to familiar problems |
| Technology | <ul style="list-style-type: none"> Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB201 Assist with circulation services.

Supersedes but is not equivalent to BSBLIB202 Process information resource orders.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS203 Assist with circulation services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply knowledge of circulation services processing and procedures to:
 - assist at least two customers with a transaction
 - assist at least two customers with an enquiry.

In the course of the above, the candidate must:

- process loans, returns and renewals according to organisational procedures
- create and modify patron records according to organisational procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of circulation systems and technology in different industry contexts, including self-service systems
- customer service systems, policies and procedures
- intra-library loans and lending procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- current industry systems and equipment for processing loan and return transactions
- policies and procedures regarding loan processing systems
- special purpose tools, equipment, materials and relevant industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS301 Develop and use information literacy skills

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to define, locate, select, evaluate and present information in response to identified needs.

The unit applies to individuals in the library and information services sector. At this level, work is usually undertaken under supervision, though some autonomy and judgement can be expected within established parameters.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Source information to meet specific needs | 1.1 Determine nature of information needs 1.2 Confirm purpose of and outcomes required from, information searches 1.3 Identify range of sources of information 1.4 Use basic search strategies to locate relevant information |
| 2. Evaluate information against needs | 2.1 Assess search results and located information and adjust search strategies as necessary 2.2 Review search results and select relevant information to meet requirements |
| 3. Prepare and present | 3.1 Prepare results of information searches according to |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| information to meet needs | organisational procedures 3.2 Present information in a format that meets the purpose |
| 4. Develop own information literacy skills | 4.1 Evaluate own information literacy skills based on feedback from relevant stakeholders 4.2 Identify opportunities to develop own information literacy skills based on evaluation |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Uses feedback from others to review own skills and seek development opportunities |
| Reading | <ul style="list-style-type: none"> Comprehends and interprets instructions and identifies, interprets relevant information from a variety of sources |
| Writing | <ul style="list-style-type: none"> Summarises material using appropriate vocabulary, grammar and text that is suitable for the audience and purpose; conveying ideas clearly, concisely and coherently |
| Oral Communication | <ul style="list-style-type: none"> Comprehends verbal instructions, directions and requests through active listening and asking relevant questions to aid understanding; and conveys ideas and information clearly and succinctly |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |
| Teamwork | <ul style="list-style-type: none"> Cooperates with others and contributes to work practices to meet planned outcomes and deadlines |
| Technology | <ul style="list-style-type: none"> Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB304 Develop and use information literacy skills.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS301 Develop and use information literacy skills

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- meet three identified information needs, by sourcing, selecting, evaluating and presenting relevant information.

In the course of the above, the candidate must:

- present information
- identify strategies to improve own information literacy skills
- complete tasks in industry realistic timelines and conditions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- types of information resources available on a range of topics
- techniques and procedures for accessing different information sources, including current technology
- organisational policies and procedures, including those related to the presentation of different types of information
- common methods for organisation of resources.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- range of print and electronic information resources
- special purpose tools, equipment, materials, systems and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS302 Organise workplace information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to receive, collect, organise and apply workplace information in the context of an organisation's work processes, record managing and knowledge management systems.

The unit applies to those who perform a defined range of skilled operations in various work contexts. They may exercise discretion and judgement using appropriate knowledge of information management to provide technical advice and support to a team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Receive, acquire and assess information | 1.1 Confirm that proposed methods of receiving and acquiring information meet organisational policies and procedures 1.2 Receive and acquire information according to organisational policies and procedures 1.3 Confirm information is clear, accurate, current and relevant to intended tasks 1.4 Access additional required information from relevant stakeholders |
| 2. Organise information | 2.1 Organise information in a format suitable for analysis, interpretation and distribution according to organisational |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------|--|
| | <p>policies and procedures</p> <p>2.2 Store information using relevant systems and technology according to organisational policies and procedures</p> <p>2.3 Distribute information to relevant stakeholders</p> <p>2.4 Identify issues accessing, organising and storing information and solve collaboratively with relevant stakeholders</p> |
| 3. Review information needs | <p>3.1 Seek feedback on clarity, accuracy, relevancy and sufficiency of information</p> <p>3.2 Review feedback and suggest updates to receipt and acquisition processes, where required</p> <p>3.3 Identify and document future information needs and suggest modifications to collection and organisation processes</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Recognises and assesses textual information to complete tasks according to requirements |
| Writing | <ul style="list-style-type: none"> Completes workplace records, forms and documentation accurately using correct format, accurate spelling and grammar and terminology specific to requirements |
| Oral Communication | <ul style="list-style-type: none"> Collects information by listening and questioning Participates in a verbal exchange using clear language to contribute information and convey issues |
| Self-management | <ul style="list-style-type: none"> Understands rights and responsibilities and complies with explicit policies and procedures and legal and regulatory requirements |
| Teamwork | <ul style="list-style-type: none"> Complies with work instructions and contributes to work group discussions using accepted conventions |
| Planning and organising | <ul style="list-style-type: none"> Plans and implements routine tasks and workload making decisions about sequencing and timing |
| Technology | <ul style="list-style-type: none"> Uses digital technology to access and record information and to communicate with others |
| Problem solving | <ul style="list-style-type: none"> Makes low impact decisions within familiar situations, based on a range of predefined or routine solutions, and evaluates the effectiveness of the outcome |

Unit Mapping Information

Supersedes and is equivalent to BSBINM301 Organise workplace information.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS302 Organise workplace information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- gather, assess, organise and distribute three pieces of workplace information.

In the course of the above, the candidate must:

- provide information according to organisational policies and procedures
- use business technology to coordinate information
- communicate with relevant stakeholders to obtain and check workplace information
- monitor, review and modify information organisation processes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- methods for checking information is clear, accurate, current and relevant for purpose
- organisational policies and procedures relating to workplace information
- features and functions of technology required to store and organise information.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures relevant to workplace information
- examples of information documents found in the workplace.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS303 Use knowledge management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to access a knowledge management system, use monitoring and review processes to provide feedback and improve own work practices using the system. This includes a range of strategies, methods, activities and techniques used by individuals and the organisation to identify, collect, organise, store, retrieve, analyse, share and apply knowledge to the work of the organisation.

The unit applies to individuals who use a broad range of competencies in various work contexts. They may exercise discretion and judgement using knowledge management to assist in increasing productivity, to improve quality or to recognise the benefits to the organisation through the improved use of knowledge.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Access and use knowledge management system | 1.1 Identify requirements for use of knowledge management system 1.2 Access knowledge management system according to legislative, regulatory and organisational policies and procedures |
| 2. Input to knowledge management system | 2.1 Collect, analyse and prepare inputs for contribution to system, according to organisational policies and procedures 2.2 Check inputs for clarity, accuracy, currency and relevance 2.3 Make inputs to system according to organisational policies and |

| | |
|--------------------------------------|--|
| | procedures 2.4 Analyse requirements of the system and make suggestions for improvements to relevant stakeholders |
| 3. Review and improve work practices | 3.1 Provide feedback about clarity, accuracy, currency and relevance of system's output to relevant personnel 3.2 Document learning resulting from use of the system 3.3 Improve work practices as a result of learning from use of the system |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none">Comprehends textual information, incorporating ideas and concepts from a range of sources, and checks for accuracy and relevance |
| Writing | <ul style="list-style-type: none">Documents information analysis and emphasises key outcomes using vocabulary and structure appropriate to audience |
| Oral Communication | <ul style="list-style-type: none">Expresses own observations and opinions using clear and specific language to relevant personnelElicits views and information from others and obtains information by listening and questioning |
| Self-management | <ul style="list-style-type: none">Understands rights and responsibilities, and complies with explicit procedures in the workplace |
| Teamwork | <ul style="list-style-type: none">Identifies and takes steps to follow accepted communication practices and protocols when providing feedback |
| Problem solving | <ul style="list-style-type: none">Plans and implements routine tasks and workload making limited decisions on sequencing, timing and collaborationUses basic functions of digital technology tools to read, record, search and input required informationUses analytical processes to review and evaluate the effectiveness of workplace systems and suggest improvements |

Unit Mapping Information

Supersedes and is equivalent to BSBINM302 Utilise a knowledge management system.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS303 Use knowledge management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- access, use and review knowledge management system according to organisational policies and procedures.

In the course of the above, the candidate must:

- provide feedback to the organisation about improvements to the knowledge management system
- produce records of outcomes resulting from the use of the system.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, regulations, standards and codes of practice that may affect knowledge management
- organisational policies and procedures for knowledge management
- strategies to review knowledge management systems.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of information documents found in the workplace
- knowledge management system (which can be a simulated system to satisfy privacy and confidentiality provisions).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS304 Process and maintain information resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to locate, check, record, store and maintain multimedia, digital and print-based information.

The unit applies to individuals working in a library and information services context who are responsible for processing and maintaining information resources, generally under supervision and within established procedures.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Undertake information processing tasks | 1.1 Label and protect information resources and apply security measures 1.2 Check outsourced shelf-ready items for processing according to organisational procedures 1.3 Identify details of information resources according to organisational procedures and processing systems 1.4 Identify issues with processing systems and procedures and report to relevant stakeholders |
| 2. Arrange resources to facilitate access | 2.1 Check and organise information resources for arrangement and classification 2.2 Arrange and shelve resources according to required |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------|--|
| | classification order and organisational requirements 2.3 Identify and follow safety procedures when handling resources |
| 3. Monitor resources | 3.1 Check resources for correct arrangement and report missing or damaged resources 3.2 Undertake basic maintenance and minor repairs of damaged resources and refer unresolved repairs to supervisor |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets, consolidates and checks completeness and accuracy of information and data |
| Writing | <ul style="list-style-type: none"> Records and completes information in organisational systems |
| Oral Communication | <ul style="list-style-type: none"> Interacts effectively in verbal exchanges, using active listening and questioning to convey and clarify information |
| Numeracy | <ul style="list-style-type: none"> Identifies and comprehends mathematical information related to counting and checking information resources |
| Teamwork | <ul style="list-style-type: none"> Complies with work instructions and contributes to work group discussions using accepted conventions |
| Self-management | <ul style="list-style-type: none"> Determines job sequence and works logically and systematically to undertake clearly defined tasks in an effective manner |
| Problem solving | <ul style="list-style-type: none"> Makes low-impact decisions within familiar situations, based on a range of pre-defined or routine solutions Responds to predictable routine problems and implements standard or logical solutions |
| Technology | <ul style="list-style-type: none"> Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures and security requirements |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB306 Process and maintain information resources.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS304 Process and maintain information resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- process and maintain three different information resource according to established procedures
- organise and place eight items using safe manual handling techniques.

In the process of the above, the candidate must

- apply a basic knowledge of classification systems and techniques for processing and maintaining information resources.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- standard methods of organising and arranging materials, equipment and information, including:
 - arrangements designed to facilitate access to materials and information
 - common classification systems and formats
- basic information technology security procedures
- organisational policies and procedures including:
 - processing
 - storage
 - repair
 - maintenance
 - disposal
 - replacement of damaged items
- protective and security devices for materials in different formats
- work health and safety requirements, including safe manual-handling techniques

- types of damage and deterioration for information, and different protection and storage options.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- industry-current equipment and classification systems
- information resources to be processed and maintained
- organisational policies and procedures
- special purpose tools, equipment and materials relevant to performance evidence
- relevant industry software packages relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS305 Participate in cataloguing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to undertake cataloguing activities using established tools, systems, technologies, conventions and standards to search, retrieve and validate data from catalogues at an introductory level.

The unit applies to individuals working in a library or information services context, under supervision, who apply a general understanding of cataloguing and bibliographic concepts in their job.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Select cataloguing tools | 1.1 Access sources of cataloguing rules and tools relevant to organisation 1.2 Identify basic components and structure of bibliographic records 1.3 Identify relevance of different cataloguing tools to various areas of work 1.4 Select relevant cataloguing tools to complete cataloguing requirements, according to organisational policies and procedures |
| 2. Search and retrieve bibliographic records | 2.1 Search online, library and external catalogues and identify availability of existing bibliographic records 2.2 Locate relevant bibliographic records |

| | |
|--------------------------------|---|
| | 2.3 Retrieve and download relevant bibliographic records to local system |
| 3. Apply cataloguing standards | 3.1 Check downloaded bibliographic records for accuracy according to cataloguing standards and organisational policies and procedures 3.2 Consult with relevant colleagues regarding accuracy of bibliographic records and refer issues to relevant stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets, consolidates and checks completeness and accuracy of information and data Interprets information from sources to identify relevant and key information |
| Writing | <ul style="list-style-type: none"> Records and completes information in organisational systems |
| Oral Communication | <ul style="list-style-type: none"> Provides key information and asks questions to clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets and uses mathematical information embedded in cataloguing systems |
| Teamwork | <ul style="list-style-type: none"> Complies with work instructions and contributes to work group discussions |
| Planning and organising | <ul style="list-style-type: none"> Plans routine tasks and coordinates own workload |
| Technology | <ul style="list-style-type: none"> Uses familiar digital technologies and systems to access information, search and enter data, and communicate with others |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB305 Use established cataloguing tools.

Supersedes but is not equivalent to:

- BSBLIB301 Catalogue objects into collections
- BSBLIB403 Complete a range of cataloguing activities.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS305 Participate in cataloguing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- select, search, and retrieve relevant bibliographic record on at least five occasions.

In the course of the above, the candidate must:

- use current industry systems, technologies and conventions
- apply cataloguing standards.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- cataloguing standards and organisational policies and procedures
- common cataloguing tools used in libraries and information services endorsed by relevant committee or similar
- application of tools to different areas of work
- key components and structure of bibliographic records
- key features of classification and subject heading schemes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- special purpose tools, equipment, materials and industry software packages relevant to performance evidence
- current cataloguing rules, technologies and systems
- standards and organisational policies and procedures documents relevant to cataloguing activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS306 Provide multimedia support

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to use a range of multimedia equipment and programs at a non-specialist level.

The unit applies to individuals who work under supervision and have some responsibility to complete work within established guidelines.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Use multimedia equipment and programs | 1.1 Select required multimedia equipment and programs for a given purpose 1.2 Set up and operate multimedia equipment and programs according to organisational procedures 1.3 Use general features and functions of multimedia equipment 1.4 Assist relevant stakeholders to use multimedia equipment and programs safely and according to organisational procedures |
| 2. Maintain multimedia equipment and programs | 2.1 Identify and correct minor operational faults according to organisational procedures 2.2 Implement routine preventive maintenance, including making arrangement for repairs 2.3 Identify situations where specialist assistance is required and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | take required action |
| 3. Review use of multimedia equipment and programs | <p>3.1 Source information from relevant stakeholders on problems with use of current multimedia equipment and programs</p> <p>3.2 Source and assess information on available multimedia equipment and programs, products and services based on feedback and intended use</p> <p>3.3 Make recommendations for purchase of new or replacement items, where required</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none">• Sources and interprets textual information to identify most efficient and productive approach to the job |
| Writing | <ul style="list-style-type: none">• Uses clear language to document requirements and outcomes |
| Oral Communication | <ul style="list-style-type: none">• Interacts effectively in verbal exchanges, using active listening and questioning, to convey and clarify information |
| Numeracy | <ul style="list-style-type: none">• Recognises and interprets numerical information relating to costs and specifications |
| Teamwork | <ul style="list-style-type: none">• Cooperates with others and contributes to work practices where joint outcomes and deadlines are to be met |
| Problem solving | <ul style="list-style-type: none">• Initiates standard diagnostic procedures when responding to familiar and unfamiliar problems within immediate context and seeks input from others when problems remain unresolved |
| Technology | <ul style="list-style-type: none">• Uses main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB303 Provide multimedia support.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS306 Provide multimedia support

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use at least one piece of physical multimedia equipment and two different digital multimedia programs.

In the course of the above, the candidate must:

- assist others to use multimedia equipment and programs
- correct minor operational faults
- make recommendations for upgrading multimedia equipment and programs.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- common multimedia options relevant to the work context at a generalist level
- features and general operating functions of different multimedia options
- common faults and ways of rectifying these in multimedia equipment and programs used
- scope of repair and maintenance activities that can be undertaken without specialist assistance
- sources of information on multimedia equipment and programs
- conditions of current licences and equipment maintenance agreements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- multimedia equipment and programs and associated software applications.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS307 Retrieve information from records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to receive a request and to deliver the records or information about the records.

The unit applies to individuals who follow established guidelines and processes to assist them to carry out their work. They work under supervision or in consultation with more senior staff or users of the system to locate records.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Locate and retrieve records required | 1.1 Identify and refine search criteria and keywords, in consultation with person making request, where required 1.2 Locate records according to defined criteria 1.3 Retrieve records to match request |
| 2. Ensure security of records | 2.1 Identify person requesting the records 2.2 Confirm access category of person, in accordance with organisational procedures 2.3 Check the access clearance of person requesting the records covers the security classification and access restrictions of the records 2.4 Exempt specific record, or portions thereof, to prevent access, |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | where required |
| 3. Provide required information or records | 3.1 Inform user of access denial in accordance with organisational procedures, where required 3.2 Prepare information for person requesting the records 3.3 Deliver records, or prepare information from records, according to organisational policies and procedures 3.4 Document the process according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies, interprets, checks and compares a range of information to inform effective and compliant actions |
| Writing | <ul style="list-style-type: none"> Accurately inputs information and documents details of records retrieval process Prepares required information in accordance with organisational procedures |
| Oral Communication | <ul style="list-style-type: none"> Asks questions and listens to responses to confirm and clarify requests Provides information according to organisational procedures |
| Numeracy | <ul style="list-style-type: none"> Recognises and uses numerical systems associated with information management systems |
| Planning and organising | <ul style="list-style-type: none"> Plans and implements routine tasks according to set processes, taking some responsibility for timing |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for the outcomes of routine decisions related directly to own role |
| Technology | <ul style="list-style-type: none"> Uses main features and functions of digital tools to search and access information and records |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG303 Retrieve information from records.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS307 Retrieve information from records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- work with relevant stakeholders to identify information requirements and retrieve relevant information on at least three occasions.

In the course of the above, the candidate must:

- record information
- provide information and responses to requests.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational procedures for records retrieval, and security and access
- key aspects of processes of records management and records management systems
- clearance categories according to organisational policies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to records and records information.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS308 Control records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to classify, register, and track records and information about records within an information management system.

The unit applies to individuals who follow guidelines and processes to make judgements on record status and classification. They work under supervision or in consultation with senior staff to support effective information management and governance practices across the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify records for capture | 1.1 Categorise incoming information into published and unpublished information and identify records, metadata and formats for capture 1.2 Identify information, format and metadata that requires capture 1.3 Circulate material which does not need to be registered or captured |
| 2. Classify records | 2.1 Match identified record to organisation's classification scheme 2.2 Select full classification and sentencing of records according to the system's rules and organisational procedures 2.3 Relate and reference classified or sentenced records to other |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------|--|
| | <p>records in information management systems</p> <p>2.4 Select indexing points and terms for records in accordance with system's rules and organisational procedures</p> |
| 3. Register records | <p>3.1 Select and record unique identifiers for records in accordance with information management system's rules and procedures, where required</p> <p>3.2 Register records into information management systems</p> <p>3.3 Document and distribute records to relevant locations or stakeholders according to special handling requirements of the record format</p> |
| 4. Track records | <p>4.1 Determine unique identifiers of records requested</p> <p>4.2 Collect storage location, history and information of records from information management systems</p> <p>4.3 Complete all record transactions according to organisational policies and procedures</p> <p>4.4 Complete and collect relevant documentation and reports</p> |
| 5. Audit records | <p>5.1 Locate records according to relevant stakeholders' instructions and requirements</p> <p>5.2 Audit records against predetermined criteria in accordance with organisational procedures and quality program</p> <p>5.3 Document and report any discrepancies</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets information from a range of texts to determine organisational requirements Reviews records against set criteria to identify discrepancies |
| Writing | <ul style="list-style-type: none"> Documents, updates and amends information accurately and in required format Prepares reports according to organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Uses active listening and questioning techniques to confirm requirements and clarify information Uses clear language, appropriate to audience, to circulate information |
| Numeracy | <ul style="list-style-type: none"> Recognises and uses numerical information management systems Recognises and compares numerical data embedded in records |

| Skill | Description |
|-------------------------|--|
| Self-management | <ul style="list-style-type: none">• Takes some personal responsibility for following organisational procedures and protocols |
| Planning and organising | <ul style="list-style-type: none">• Plans routine tasks according to set procedures, taking some responsibility for timing |
| Technology | <ul style="list-style-type: none">• Uses main features and functions of digital tools to control records |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG301 Control records.

Supersedes but is not equivalent to:

- BSBLIB302 Develop and apply knowledge of archives
- BSBRKG302 Undertake disposal.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS308 Control records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify, classify, register and track the location of at least four records according to organisational policies and procedures.

In the course of the above, the candidate must:

- identify activities documented by records
- apply classification schemes
- record metadata accurately
- audit records and document discrepancies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features and processes of records management and records management systems
- common organisational records functions
- key aspects of organisational policies and procedures that relate to records control
- metadata relevant to information collected
- common categories of information
- indexing points and terms for records.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to controlling records.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS309 Maintain business records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to maintain the records of a business on an operational basis.

The unit applies to individuals who follow established guidelines and processes to carry out their work. They work under supervision or in consultation with senior staff or system users to support effective information management and governance practices across the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Collate business records | 1.1 Identify relevant information and records according to organisational policies and procedures 1.2 Organise records in accordance with organisational policies and procedures 1.3 Follow relevant security and access requirements in accordance with organisational policies and procedures |
| 2. Update business or records system | 2.1 Record and update information and record description of new records in business or records system according to organisational policies and procedures 2.2 Identify and dispose of relevant records of redundant business |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | activities from current system according to organisational policies and procedures |
| 3. Prepare and distribute reports from the business or records system | 3.1 Interpret requests for reports 3.2 Prepare reports from business or records system according to request and organisational security and access procedures 3.3 Distribute reports to relevant stakeholders according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-----------------|---|
| Reading | <ul style="list-style-type: none"> Gathers and interprets textual information from different sources to determine how information and records may be applied |
| Writing | <ul style="list-style-type: none"> Uses clear and industry related terminology to document, complete and update workplace information and records |
| Numeracy | <ul style="list-style-type: none"> Recognises and uses numerical systems associated with business or record systems |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for planning and organising own workload to ensure work deadlines are met Takes responsibility for the outcomes of routine decisions related directly to own role |
| Technology | <ul style="list-style-type: none"> Uses main features and functions of digital tools to maintain business records |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG304 Maintain business records.

Supersedes but is not equivalent to BSBRKG305 Review recordkeeping functions.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS309 Maintain business records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify, organise, update, and distribute four business records in compliance with organisational policies and procedures on at least three separate occasions.

In the course of the above, the candidate must:

- record and update information in an information management system
- describe records.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures regarding the maintenance and security of business records
- organisational requirements of business or records system reports
- key aspects and processes of records management and records management systems.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to business records.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS401 Analyse and present research information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to collect, organise, analyse and present information using available systems and sources. This includes identifying research requirements and sources of information, evaluating the quality and reliability of the information, and preparing and producing reports.

The unit applies to those who are required to analyse and apply their knowledge of the organisation to research tasks, evaluate information from a variety of sources and apply solutions to a range of predictable and unpredictable problems.

No licensing, legislation or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify and confirm research strategy | 1.1 Identify research objectives according to organisational requirements 1.2 Identify potential sources for research information relevant to organisation requirements 1.3 Assess reliability of potential sources 1.4 Identify and confirm information research strategy is relevant to the research objectives |
| 2. Collect and store research information | 2.1 Access and extract relevant information in a format suitable for analysis and distribution according to research strategy |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 2.2 Store research information according to security requirements and organisational policies and procedures |
| 3. Analyse and synthesise research information | 3.1 Analyse stored information according to research strategy 3.2 Identify themes and draw conclusions according to research strategy 3.3 Demonstrate that assumptions and conclusions used in analysis are clear, justified, supported by evidence and consistent with research strategy |
| 4. Present research information | 4.1 Identify methods of reporting that align with the intended audience and relevant organisational requirements 4.2 Draft research report on findings 4.3 Facilitate review of draft report according to organisational policies and procedures 4.4 Distribute research report according to organisational policies and procedures 4.5 Obtain feedback and comments on suitability and sufficiency of findings in accordance with organisational requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Analyses and evaluates textual information to develop information research strategies, integrate facts and ideas and meet organisational requirements |
| Writing | <ul style="list-style-type: none"> Gathers, evaluates and integrates information from a range of sources Presents findings, recommendations and issues in required format using language, structure and style appropriate to audience |
| Oral Communication | <ul style="list-style-type: none"> Presents recommendations and issues using language appropriate to audience and according to organisational requirements |
| Self-management | <ul style="list-style-type: none"> Plans, organises and implements tasks to meet organisational requirements Takes responsibility for the outcomes of routine decisions related directly to own role |
| Problem solving | <ul style="list-style-type: none"> Identifies and solves foreseeable problems in familiar work contexts |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital technologies and tools to |

| Skill | Description |
|-------|----------------------------------|
| | research and analyse information |

Unit Mapping Information

Supersedes and is equivalent to BSBRES411 Analyse and present research information.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS401 Analyse and present research information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- research, analyse and present research findings according to organisational requirements on at least two occasions.

In the course of the above, the candidate must:

- identify research requirements and objectives
- collect, organise and present research information
- maintain information securely
- prepare report on research findings, including:
 - justified assumptions and conclusions
 - efficient and reliable research methods.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures relating to:
 - accessing information
 - storing information
 - security requirements
 - form and content of research report
- key aspects of the reliability and validity of research and analysis
- common research strategies
- key aspects of relevant information sources, including:
 - reliability
 - accuracy
 - authority

- audience
- relevance
- likelihood of bias.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace information systems, equipment and resources relevant to performance evidence
- workplace policies and procedures relevant to performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS402 Coordinate workplace information systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to implement and review workplace information systems. It involves identification, collection, initial analysis and use of information.

The applies to individuals whose work will normally be carried out within methods and procedures which require planning and evaluation, leadership and guidance of others, and some discretion and judgement.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify and review information needs | 1.1 Identify information required by relevant stakeholders 1.2 Review information requirements to determine suitability, accessibility, currency and reliability of information according to organisational policies and procedures |
| 2. Collect, analyse and report information | 2.1 Collect information which is adequate and relevant to the requirements of relevant stakeholders 2.2 Confirm information is in a format suitable for analysis, interpretation and distribution 2.3 Analyse information, identify and report relevant trends according to the requirements for which it was collected |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| 3. Implement information systems | <p>3.1 Implement information systems effectively to store, retrieve and regularly review information for decision making purposes</p> <p>3.2 Use technology available in the work area to manage information effectively</p> <p>3.3 Recommend improvements to information system to relevant stakeholders</p> |
| 4. Support information system continuous improvement | <p>4.1 Collect data about information system future needs in consultation with relevant stakeholders</p> <p>4.2 Confirm identified information system future needs reflect the organisation's business plans</p> <p>4.3 Assist development of proposals for continuous improvement of information system</p> <p>4.4 Distribute information to relevant stakeholders on information system changes, where required</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none">Critically analyses documentation from a variety of sources and consolidates information |
| Writing | <ul style="list-style-type: none">Develops information for a specific audience using clear and detailed language |
| Oral Communication | <ul style="list-style-type: none">Uses active listening and questioning to convey and clarify information and to confirm understanding |
| Numeracy | <ul style="list-style-type: none">Selects from and uses mathematical strategies to perform initial analysis on information |
| Planning and organising | <ul style="list-style-type: none">Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |
| Teamwork | <ul style="list-style-type: none">Cooperates with others and contributes to work practices where joint outcomes are expected and deadlines are to be met |
| Problem solving | <ul style="list-style-type: none">Contributes to continuous improvement of current work practices by applying basic principles of analytical thinking |
| Technology | <ul style="list-style-type: none">Uses digital technologies and systems to access, enter, present and distribute information |

Unit Mapping Information

Supersedes and is equivalent to BSBINM401 Implement workplace information system.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS402 Coordinate workplace information systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- distribute information to relevant stakeholders in response to three different workplace information needs
- implement and review a workplace information system on at least one occasion.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key aspects of workplace information systems including:
 - budgets and financial management systems
 - customer information software or records
 - databases
 - product and service information
 - project management software
 - record management systems
 - spreadsheets.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- a workplace information system
- organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS403 Obtain information from external and networked sources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish the information needs of relevant stakeholders, and then search external and networked sources to meet those needs.

The unit applies to those who are working in library services within established guidelines and under general supervision. They may be working in public, school, medical, law, business, or academic libraries. Requests relate to information that cannot be satisfied from sources within the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine stakeholder information needs | 1.1 Determine and confirm exact nature of information needs with relevant stakeholder 1.2 Discuss options for satisfying requests with relevant stakeholder, taking into account any specific requirements 1.3 Keep relevant stakeholder informed of delivery progress 1.4 Recommend alternative options to fulfil relevant stakeholder information needs, where required |
| 2. Clarify details of required information | 2.1 Verify bibliographic and other relevant details and locate required information resources |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| resources | 2.2 Check availability of required information from external or networked sources |
| 3. Search external and networked sources | 3.1 Complete information search based on knowledge of external and networked sources 3.2 Check availability of information resources from external and networked sources by searching catalogues for items already held, and electronic databases 3.3 Identify reciprocal interlibrary lending networks and document delivery systems and services to source required information 3.4 Seek assistance to source information that is difficult to locate |
| 4. Obtain and return information | 4.1 Complete and despatch requests to external sources using organisational standards, systems and procedures 4.2 Monitor requests to and from external sources and follow-up, as required 4.3 Check condition of information resources received from external sources and confirm they meet relevant stakeholder needs 4.4 Monitor receipt of electronic documents and present to customers using approved delivery methods 4.5 Confirm compliance with copyright legislation in relation to supply of photocopied or electronic documents 4.6 Take action to recall material, where required, and return to provider in the required condition 4.7 Inform provider of difficulties in relation to return of material and take action |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|---|
| Reading | <ul style="list-style-type: none"> Evaluates information resources from a variety of sources to ensure appropriateness to client needs Interprets information from sources to identify relevant and key information |
| Writing | <ul style="list-style-type: none"> Records and completes organisational documents and correspondence using clear language and correct spelling, grammar and terminology |
| Oral | <ul style="list-style-type: none"> Uses techniques, including active listening and questioning, to clarify information and confirm understanding |

| Skill | Description |
|-----------------|--|
| Communication | |
| Self-management | <ul style="list-style-type: none">• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |
| Problem solving | <ul style="list-style-type: none">• Responds to predictable routine problems and implements standard or logical solutions |
| Technology | <ul style="list-style-type: none">• Uses familiar digital technologies and systems to access information, search and enter data, present information and communicate with others |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB406 Obtain information from external and networked sources.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS403 Obtain information from external and networked sources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- respond to a request for an inter-library loan
- respond to a request for a document delivery
- request an inter-library loan
- request a document delivery.

In the course of the above, the candidate must:

- communicate effectively and efficiently with relevant stakeholders
- use external sources and bibliographic tools, including electronic sources, to obtain different types of information
- search external sources effectively to meet a range of different information needs.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key components of bibliographic records
- key features of copyright legislation relevant to inter-library loans and document delivery
- relevant external sources of information
- common information services networks that facilitate access to external sources
- common interlibrary lending policies and standards, and codes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- a range of library and information services and resources
- industry-current information technologies
- policies, procedures and documents on accessing external sources of information
- special purpose equipment, materials and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS404 Search library and information databases

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to search and analyse information from a range of bibliographic and full text databases, evaluate these against specific criteria, and then present this information to relevant stakeholders.

The unit applies to individuals who undertake regular database searches as part of their information services role. Work is undertaken with limited supervision and according to organisational and system guidelines.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify and access databases | 1.1 Identify range of databases available to information services providers 1.2 Differentiate between databases and internet websites as sources of information 1.3 Select databases to meet specific information needs 1.4 Use required procedures to access databases 1.5 Comply with copyright and licensing conditions relevant to use of databases |
| 2. Construct searches | 2.1 Conduct database searches using search techniques relevant to information needs |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------|---|
| | 2.2 Use databases to access required information 2.3 Consult manuals to refine or revise search strategies, where required |
| 3. Present information | 3.1 Evaluate search results to meet identified information needs 3.2 Organise and present information according to stakeholder needs |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Critically analyses information from a variety of sources and consolidates information to determine requirements |
| Writing | <ul style="list-style-type: none"> Records and completes organisational documents using clear language and correct spelling, grammar and terminology |
| Oral Communication | <ul style="list-style-type: none"> Uses appropriate techniques, including active listening and questioning, to clarify information and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Extracts and evaluates mathematical information embedded in a range of tasks and texts |
| Problem solving | <ul style="list-style-type: none"> Responds to predictable routine problems and implements standard or logical solutions |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |
| Technology | <ul style="list-style-type: none"> Uses familiar digital technologies and systems to access information, search and enter data, present information, and use databases |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB407 Search library and information databases.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS404 Search library and information databases

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- access, search and present information from at least three different databases.

In the course of the above, the candidate must:

- adopt search techniques to source information in response to a range of customer needs
- use current industry systems and equipment
- respond to multiple and varied information requests.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- role of databases in context of the information services industry
- scope and type of databases available to information services providers
- features of commonly used databases, including:
 - bibliographic information
 - downloadable records
 - full text availability
 - thesaurus or subject authority
- differences between database and internet searching
- relevant copyright, moral rights and intellectual property issues and legislation relevant to the use of information from databases.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- technology and databases to support information searching
- special purpose tools, equipment, materials and relevant industry software packages relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS405 Use integrated library management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to apply a basic understanding of the functions of integrated library management systems (ILMS) to use online catalogues, process loan transactions, and provide circulation and lending services to meet customer needs.

The unit applies to individuals in frontline information services roles in libraries working under limited supervision, within established policies and procedures.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Create records in the ILMS | 1.1 Use basic functions of an ILMS, including interrelation of different modules 1.2 Check and process new borrowers on the ILMS according to organisational policies and procedures 1.3 Process an acquisition by creating a record in the acquisition module 1.4 Create a reservation request through the ILMS |
| 2. Provide customer support in relation to circulation and lending | 2.1 Provide current and accurate information to relevant stakeholders in relation to circulation and lending policies and procedures, including self-service systems 2.2 Process loan and return transactions according to organisational |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>policies and procedures, including security procedures</p> <p>2.3 Follow safe work practices when performing circulation and lending services</p> <p>2.4 Handle competing demands for services according to customer service standards</p> <p>2.5 Resolve customer enquiries and complaints within scope of own job role</p> <p>2.6 Refer complex customer queries and complaints to relevant personnel</p> <p>2.7 Provide information on range of services which may incur costs</p> |
| 3. Use online catalogues to assist customers | <p>3.1 Use basic search features of online catalogues to provide current and accurate information to relevant stakeholders</p> <p>3.2 Use online catalogues to assist customers in locating information resources in library collections</p> <p>3.3 Explain classification numbers and shelving location symbols or prefixes displayed on online catalogues to customers</p> |
| 4. Maintain knowledge of ILMS trends and emerging technologies | <p>4.1 Source information about current industry trends and emerging technologies in relation to ILMS</p> <p>4.2 Provide information to colleagues in relation to add-on library automation software and hardware</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets information from structured texts, instructions and correspondence from colleagues or customers, and derives relevant information from more complex texts |
| Writing | <ul style="list-style-type: none"> Conveys technical and procedural information accurately and succinctly and communicates information in a style appropriate to purpose and audience |
| Oral Communication | <ul style="list-style-type: none"> Establishes and maintains empathetic spoken communication with customers, checks for understanding and clearly conveys information in a manner appropriate in the context |
| Numeracy | <ul style="list-style-type: none"> Selects, interprets and applies mathematical information embedded in simple financial transactions and information systems |
| Planning and | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |

| Skill | Description |
|-----------------|--|
| organising | |
| Teamwork | <ul style="list-style-type: none">• Uses a range of strategies to establish a sense of connection and build rapport with customers and colleagues |
| Problem solving | <ul style="list-style-type: none">• Recognises and responds to predictable routine problems related to role in immediate work context• Applies analytical processes to resolve technical or conceptual problems |
| Technology | <ul style="list-style-type: none">• Uses familiar digital technologies and systems to access information, search and enter data, present and distribute information |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB404 Use integrated library management systems.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS405 Use integrated library management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use integrated library management systems (ILMS) to:
 - process loans and returns according to organisational policies and procedures on at least two occasions
 - conduct basic online catalogue searches on at least two occasions
 - create records in acquisitions module on at least two occasions
 - create reservations on at least two occasions.

In the course of the above, the candidate must:

- maintain knowledge of trends and emerging technologies affecting ILMS
- demonstrate customer support.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of ILMS
- interrelation between different functions of an integrated library management system, including cataloguing, circulation, and acquisitions modules
- key features of online catalogues
- key features of automated circulation systems, including self-charging systems and associated technologies
- organisational policies and procedures relating to:
 - lending
 - inter-library loans
 - security
 - financial transactions

- customer service
- processing loans and returns
- circulation services
- common safe work practices relating to using an ILMS.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures relevant to performance evidence
- ILMS for loan processing and catalogue use, acquisitions and reservations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS406 Assist customers to access information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to help customers obtain required information, which can be found in readily accessible sources.

The unit applies to individuals working in frontline information services roles in any industry sector. They may be working in library and information services organisations, records management units, government departments, tourist information centres or community advisory organisations. These roles are undertaken within established guidelines under general supervision.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Clarify customer information requirements | 1.1 Identify exact nature of information request 1.2 Confirm purpose of information request and any special requirements |
| 2. Follow search strategies | 2.1 Construct and follow search strategies to locate information using industry-current information 2.2 Assist customers to develop own information-seeking skills 2.3 Advise customers on other access arrangements, including inter-library loans and document delivery and supply services 2.4 Inform customers of constraints regarding access to information |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|---|
| | according to organisational policies and procedures |
| 3. Source and provide information | 3.1 Source information from sources in response to relevant customer's requests 3.2 Provide information according to request 3.3 Confirm relevant customer's requirements are satisfied 3.4 Take action to resolve remaining issues or refer customers to other personnel, as required |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets information from sources to identify relevant and key information |
| Writing | <ul style="list-style-type: none"> Documents information, selecting selects appropriate vocabulary and structure for audience, for informal and formal purposes |
| Oral Communication | <ul style="list-style-type: none"> Interacts effectively in verbal exchanges, using active listening and questioning, to convey and clarify information Explains detailed information using language, tone and pace appropriate to audience |
| Planning and organising | <ul style="list-style-type: none"> Organises, plans and sequences own workload |
| Problem solving | <ul style="list-style-type: none"> Responds to predictable routine problems and implements standard or logical solutions |
| Technology | <ul style="list-style-type: none"> Uses familiar digital technologies and systems to access information, and assist customers |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB405 Assist customers to access information.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS406 Assist customers to access information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- assist customers to access information from a variety of sources on at least four different occasions.

In the course of the above, the candidate must:

- use bibliographic tools and industry-current technology
- search and locate a range of information sources and communicate to relevant stakeholders
- communicate to clarify information requirements of stakeholder
- respond to stakeholders with information to complete their own searches.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures, including:
 - customer assistance
 - access to information
- typical customer requests and appropriate information sources for responding
- techniques for using reference resources and tools, including formulating search strategies
- range of information resources, formats and delivery options, including:
 - document delivery and supply processes
 - electronic and print
 - inter-library loans.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- a range of library and information services and resources
- industry-current information technologies
- organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS407 Consolidate and maintain library industry knowledge

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop, apply and maintain currency of knowledge relevant to the library industry.

The unit applies to individuals working in organisations providing library services, and who work autonomously according to established procedures.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Undertake industry research | 1.1 Use a variety of sources of information to research industry developments and their impact on current work practices 1.2 Collect information on the role and significance of library industry to relevant communities 1.3 Identify similarities and differences between industry organisations 1.4 Identify roles of relevant peak professional associations and industry bodies |
| 2. Source and apply information about trends | 2.1 Research current and emerging technologies and their potential application in the workplace 2.2 Source and monitor information about career opportunities and employment conditions |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|--|
| | 2.3 Distribute information about key issues and trends, and emerging technologies to relevant stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none">Identifies, analyses and evaluates complex text to determine legislative, regulatory and business requirementsResearches and interprets information from various sources and synthesises ideas and concepts |
| Writing | <ul style="list-style-type: none">Develops material to a specific audience using clear and detailed language to convey explicit information, requirements and recommendations |
| Oral Communication | <ul style="list-style-type: none">Elicits views and opinions of others by listening and questioning |
| Planning and organising | <ul style="list-style-type: none">Organises, plans and sequences own workload |
| Teamwork | <ul style="list-style-type: none">Cooperates with others and contributes to work group discussions |
| Technology | <ul style="list-style-type: none">Uses a range of digitally based technologies to access, extract and share relevant information to achieve required outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB402 Consolidate and maintain industry knowledge.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS407 Consolidate and maintain library industry knowledge

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least one occasion, source, assess and review information for the library industry.

In the course of the above, the candidate must:

- explain value and principles of relevant industry sector, and how they relate to funding and service delivery
- identify and distribute major industry trends and technology developments.
- recognise legislation and ethical issues relevant to the workplace.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- sources of information on relevant industries
- current and emerging technologies relevant to a range of sources of information
- underpinning values, principles and philosophies of the library industry
- key features of legislation and ethical practices impacting the library industry
- career opportunities and employment conditions in the library industry
- current trends within the relevant industry sectors and the potential impacts and opportunities they present
- funding models in the library industry
- nature, role and functions of relevant major professional associations or industry bodies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- current sources of library industry information.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS408 Provide information from and about records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to provide responses to enquiries from potential users of records, using relevant processes to access and provide information about records according to organisational policies and procedures.

The unit applies to individuals who use a range of organisational and analytical techniques in working with an organisation's business and records systems.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify and retrieve records required | <p>1.1 Identify specific information required or search criteria provided by relevant stakeholders</p> <p>1.2 Identify records likely to contain information required and identify availability using relevant search aids and records systems</p> <p>1.3 Retrieve range of records likely to contain information required by user, and analyse content</p> <p>1.4 Track records to identify and document any change in content, use and location according to organisational policies and procedures</p> <p>1.5 Explain to relevant stakeholders any issues in obtaining specific</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | records within time requirements and negotiate a timeframe for delivery of records |
| 2. Interpret and administer access rules and procedures | 2.1 Identify person requesting records and confirm access clearance, according to organisational procedures 2.2 Check security classification of records and access restrictions cover the access clearance of person requesting the record 2.3 Inform person requesting records of their rights to review the decision where access restriction rules and guidelines prevent access |
| 3. Provide the required information or records | 3.1 Mask specific records, or portions thereof, according to access rules and organisational policies and procedures, where required 3.2 Prepare requested information and records according to organisational policies and procedures 3.3 Document records retrieval process according to business or information management system operation and organisational policies and procedures 3.4 Record new locations of records provided to relevant stakeholder in accordance with system rules and organisational procedures 3.5 Distribute records or records information |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from a variety of organisational and regulatory texts to determine required actions |
| Writing | <ul style="list-style-type: none"> Prepares information or records for others in required organisational format Inputs information to locate records and records details of documents according to organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Communicates verbally to gather or provide information using language appropriate to audience |
| Numeracy | <ul style="list-style-type: none"> Recognises and interprets numerical information relating to record storage systems, record classification, timeframes and dates |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for planning, organising and implementing tasks required to achieve organisational requirements in a timely fashion |

| Skill | Description |
|------------|---|
| Technology | <ul style="list-style-type: none">Uses digital systems and tools to provide records or information about records to relevant stakeholders |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG402 Provide information from and about records.

Supersedes but is not equivalent to BSBRKG401 Review the status of a record.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS408 Provide information from and about records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify records which accurately fulfil relevant stakeholder's requests and retrieve and distribute the record or record information on at least three occasions.

In the course of the above, the candidate must:

- apply access and security rules to the provision of records
- complete documentation required for record retrieval including new location.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of the identification system used by the organisation to name, code, locate and categorise records
- principles and processes of records management and information management systems
- organisational policies and procedures that relate to information access and security.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS409 Maintain and monitor digital information and records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to maintain and monitor information and records digitally. It includes skills and knowledge to identify and assess information and records for storage.

The unit applies to individuals who use guidelines and processes to inform judgements on the status and classification of records in an existing business or information management system. They work under supervision or in consultation with more senior staff or users of the system.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Confirm requirements for maintaining and monitoring digital information and records | 1.1 Identify and verify organisational and risk management requirements for classifying and storing information 1.2 Identify organisational policies and procedures for recording digital information 1.3 Prepare a checklist of organisational requirements to assess digital information to be captured |
| 2. Identify and assess records for storage | 2.1 Categorise and describe incoming and outgoing records information in terms of key activities and responsible stakeholder |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.2 Assess information against the organisational checklist of requirements to assess electronic records to be captured 2.3 Dispose of information not to be retained, according to organisational policies procedures 2.4 Determine storage methods and media in accordance with retention requirements |
| 3. Coordinate digital information and records | 3.1 Classify and sentence records according to system rules and organisational policies procedures 3.2 Assign unique identifiers and register records into the information management system according to system rules and organisational policies procedures 3.3 Determine and document access and security status and disposal requirements of records according to organisational policies procedures 3.4 Store records on required media in accordance with organisational and record retention requirements 3.5 Migrate records across mediums according to organisational policies and procedures 3.6 Action and record archiving or disposal of records according to disposal schedule and organisational policies and procedures 3.7 Maintain records in a usable and accessible form in accordance with security conditions and legislative requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies, interprets, analyses and reviews information from a range of texts |
| Writing | <ul style="list-style-type: none"> Develops list of information management requirements in required format Inputs information to create, identify, retrieve or modify records |
| Oral Communication | <ul style="list-style-type: none"> Communicates to exchange information with others using questioning and active listening to clarify requirements |
| Numeracy | <ul style="list-style-type: none"> Interprets and analyses numerically expressed information from records to determine their classification and management requirements |

| Skill | Description |
|-------------------------|--|
| Self-management | <ul style="list-style-type: none">• Takes personal responsibility for following organisational policies and procedures |
| Planning and organising | <ul style="list-style-type: none">• Sequences and schedules tasks required to achieve outcomes according to organisational policies and procedures |
| Technology | <ul style="list-style-type: none">• Uses digital systems and tools to access, organise, analyse and display records, showing awareness of the need for data security |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG404 Monitor and maintain records in an online environment.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS409 Maintain and monitor digital information and records

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage record creation, migration and disposal processes digitally on at least three occasions.

In the course of the above, the candidate must:

- monitor usage of digital information management system
- monitor application of system procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key principles and processes of digital records management and digital records management systems
- organisational policies and procedures for capturing records in networked systems
- methods of disposal and archiving
- risk management requirements for classifying and storing networked information.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to records management
- workplace documentation and resources
- storage methods and storage media.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS410 Implement records systems for small business

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to research, develop and implement business or records systems for a small business.

The unit applies to individuals who use a range of organisational, analytical and communication techniques to carry out the responsibilities of their role and report directly to a supervisor or manager within the business or section of a larger organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine information management requirements | <ul style="list-style-type: none">1.1 Consult with relevant stakeholders and identify and document core business functions, supporting activities, resources, and business and social contexts1.2 Research and identify organisational functions and activities for which records must be kept1.3 Analyse the organisation's functions and activities and identify required detail and format of records1.4 Identify security and access requirements for records system content from analysis of organisation's activities1.5 Analyse business documentation to determine organisational reporting and accountability requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| 2. Select required records system | <p>2.1 Identify metadata needed to describe, store, locate and retrieve records in a records system</p> <p>2.2 Specify technological, internal controls, maintenance, disposal and updating requirements of prospective records systems according to scale and nature of business operations</p> <p>2.3 Select records systems that meets required requirements according to scale, nature, and organisational cash flow requirements</p> |
| 3. Develop procedures and implement records system | <p>3.1 Develop rules for incorporating individual records and metadata into records system</p> <p>3.2 Develop and document procedures for the use of the system</p> <p>3.3 Distribute information and instructions to relevant stakeholders in the use of the records system</p> <p>3.4 Monitor and assist with implementation of the records system</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none">Evaluates and interprets information from a range of relevant sources and identifies relevant and key information |
| Writing | <ul style="list-style-type: none">Creates documents to convey information and instructions using language and format appropriate to text and audience |
| Oral Communication | <ul style="list-style-type: none">Uses active listening and questioning techniques to confirm and clarify informationCommunicates using words and non-verbal features appropriate to the audience and context |
| Numeracy | <ul style="list-style-type: none">Interprets, compares and contrasts numerical data to determine needsUses numerical systems associated with record storage systems |
| Planning and organising | <ul style="list-style-type: none">Uses understanding of organisational requirements in planning an appropriate information management systemSequences and schedules tasks required to achieve outcomes and manages relevant communication |
| Technology | <ul style="list-style-type: none">Uses digital systems and tools to complete tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG403 Set up a business or records system for a small business.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS410 Implement records systems for small business

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify, select, develop and implement a records system for a small business.

In the process of the above, the candidate must:

- document the steps used to determine the criteria for a records system appropriate to the organisation's business functions and reporting requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key principles and processes of records management and records management systems
- internal controls required of the business or records system
- key characteristics of the organisational functions, structure and culture relevant to implementation of records system
- organisational policies and procedures relevant to implementing a records system in a small business.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS501 Implement information and knowledge management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to organise training for an information and knowledge management system and to implement the use of the system.

The unit applies to individuals who are responsible for ensuring relevant information and corporate knowledge are retained, accessible and improve business outcomes.

It applies to information and knowledge management systems that comprise policies, protocols, procedures and practices to manage information or knowledge within the organisation and among relevant stakeholders.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Implement use of management system | 1.1 Identify legislative requirements, and organisational policies and procedures 1.2 Implement information and knowledge management system according to legislative requirements and organisational policies and procedures 1.3 Address implementation issues and problems, where required 1.4 Collect information on relevant key performance indicators 1.5 Identify contingencies and refer technical specialist help, where |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | required |
| 2. Organise learning to use management systems | 2.1 Identify learning requirements of relevant stakeholders for use of an information and knowledge management system 2.2 Identify and secure resources required for learning activities to use an information and knowledge management system 2.3 Organise and facilitate learning activities 2.4 Promote and support use of the system throughout the organisation 2.5 Monitor and document effectiveness of learning activities |
| 3. Review use of management system | 3.1 Analyse effectiveness of system and report on strengths and limitations of the system 3.2 Recommend improvements to information and knowledge management system, where required |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Writing | <ul style="list-style-type: none"> Prepares and produces documentation for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations |
| Oral Communication | <ul style="list-style-type: none"> Presents information using structure and language to suit the audience Uses active listening and questioning and reading of verbal and non-verbal signals to clarify information and to confirm understanding |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulation |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others, sharing information to build strong work groups and avoid behaviours that are not conducive to a productive environment Elicits feedback and provides feedback to others in order to improve self or workgroup behaviours |
| Planning and organising | <ul style="list-style-type: none"> Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others and taking into account capabilities, efficiencies and effectiveness Monitors progress of plans and schedules and reviews and changes them to meet new demands and priorities |

| Skill | Description |
|---------------------------|---|
| Problem solving | <ul style="list-style-type: none">• Applies systematic and analytical processes to address problems and make decisions in complex situations |
| Innovation and enterprise | <ul style="list-style-type: none">• Investigates new and innovative ideas to continuously improve, work practices and processes |
| Technology | <ul style="list-style-type: none">• Uses and investigates new digital technologies and applications to manage and manipulate data and communicate effectively with others |

Unit Mapping Information

Supersedes and is equivalent to BSBINM501 Manage an information or knowledge management system.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS501 Implement information and knowledge management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement and review one information management system
- implement and review one knowledge management system
- facilitate learning on both these information and knowledge management systems.

In the course of the above, the candidate must:

- identify learning needs and plan and implement learning activities to enable personnel to use information and knowledge management system
- monitor performance and address issues and contingencies as they arise including:
 - accessing technical specialists, as required
 - applying correct policies and procedures for the information or knowledge management system
 - evaluating effectiveness of information or knowledge management system for intended outcomes
- recommend improvements to systems, policies and practices, where required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- relevant legislation, regulation, standards and codes
- organisational policies and procedures, including those related to:
 - information management
 - knowledge management
- organisational operations and existing data and information systems
- relevant learning activities and key performance indicators.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulation, standards and codes relevant to information and knowledge management
- workplace systems, documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS502 Coordinate data management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and coordinate data management and use a data management plan to ensure relevant stakeholders have sufficient access for organisational purposes.

The unit applies to individuals who are responsible for ensuring that data is readily available and accessible for analysis. It applies to a wide range of data such as business performance data, customer data, statistical data and financial data.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Create data management plan | <ul style="list-style-type: none">1.1 Identify data and data sources in organisation that require management1.2 Confirm identified data adheres to relevant legislation, standards and organisational policies and procedures1.3 Research the required format, methods of access, and size of relevant data1.4 Select storage, access and analysis requirements according to research1.5 Document and create data management plan according to organisational policies and procedures |

| | |
|---|--|
| 2. Coordinate collection and storage of data | 2.1 Identify required stakeholders and confirm data collection according to data management plan 2.2 Confirm collected data is stored according to data management plan 2.3 Review collection and storage of data and confirm it is according to data management plan |
| 3. Coordinate extraction and analysis of data | 3.1 Identify relevant stakeholder data requirements 3.2 Identify data to be extracted 3.3 Confirm data is extracted by relevant stakeholder according to data management plan 3.4 Confirm stakeholders analyse data according to data management plan |
| 4. Monitor and review data management | 4.1 Establish diagnostic measures to monitor relevant stakeholders' access to data 4.2 Document number of relevant stakeholders that have accessed data 4.3 Review diagnostics and safeguards 4.4 Identify issues in data access and management 4.5 Rectify issues according to organisational policies and procedures and refer when required |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Critically analyses complex documentation from a variety of sources and consolidates information relating to specific criteria to determine requirements |
| Writing | <ul style="list-style-type: none">Develops material for a specific audience using clear and detailed language in order to convey explicit information, requirements and recommendations |
| Oral Communication | <ul style="list-style-type: none">Uses active listening and questioning and reading of verbal and non-verbal signals to convey and clarify information and to confirm understanding |
| Teamwork | <ul style="list-style-type: none">Cooperates with others and contributes to work practices where joint outcomes are expected and deadlines are to be met |
| Self-management | <ul style="list-style-type: none">Takes responsibility for following policies, procedures and legislative requirements and identifies organisational implications of new legislation or regulation |

| SKILL | DESCRIPTION |
|-------------------------|---|
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |
| Technology | <ul style="list-style-type: none">• Uses familiar technologies and systems to access, enter, present and communicate data and information |

Unit Mapping Information

No equivalent unit. New unit.

Supersedes but is not equivalent to BSBLIB508 Analyse and describe information resources.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS502 Coordinate data management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions, create a data management plan and coordinate data management according to plan, including:
 - selecting storage, access and analysis requirements for data
 - establishing diagnostic measures
 - reviewing data management.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- existing and emerging technologies and how they can be used in data management
- key features of data management systems and related diagnostics
- common data analysis methods
- relevant legislation, standards and organisational policies and procedures
- methods to store and access data.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to data management
- technology and equipment required for the demonstration of the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS503 Monitor compliance with copyright and licence requirements

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to monitor compliance with copyright and licence requirements for collections held by businesses, archives, galleries, libraries and museums.

The unit applies to individuals who are responsible for monitoring the organisation's compliance with copyright and licence requirements regarding collections held in archives, galleries, libraries and museums, and who operate autonomously but in consultation with other relevant stakeholder.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Monitor compliance with copyright legislation | 1.1 Research information sources to keep abreast of information about copyright relevant to libraries and cultural institutions 1.2 Review and confirm consistency of organisational procedures with copyright obligations and organisational policy 1.3 Identify gaps in procedures to be addressed and seek specialist advice, where required 1.4 Identify sources of specialist advice about copyright legislation 1.5 Advise relevant stakeholders about legal and economic |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | implications of copyright infringement and other legislative obligations |
| 2. Monitor licence agreements | 2.1 Identify materials within organisations that require licences 2.2 Research organisational protocols regarding licences and implications for digital rights management 2.3 Source information regarding licence agreements between own organisation and vendors of electronic resources 2.4 Explain to relevant stakeholders their responsibilities in relation to licence and digital rights management |
| 3. Assess risks associated with donated and culturally sensitive material | 3.1 Use organisational procedures for accepting donations and culturally sensitive material and confirm consistency with organisational policies and procedures 3.2 Identify copyright and licence risks associated with these practices 3.3 Provide advice about identified risks to relevant stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets complex information from sources to identify relevant and key information |
| Writing | <ul style="list-style-type: none"> Articulates complex ideas in language appropriate to intended audience Uses clear and coherent language to provide advice and present different strategies |
| Oral Communication | <ul style="list-style-type: none"> Uses an appropriate tone and vocabulary to express complex ideas to different audiences |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises, implements and reviews systems and processes to manage compliance with relevant regulations and legislation |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others, sharing information to build strong work groups |
| Problem solving | <ul style="list-style-type: none"> Systematically gathers and analyses all relevant information and evaluates options to make decisions Uses problem solving techniques to identify and analyse issues |
| Technology | <ul style="list-style-type: none"> Uses main features and functions of digital tools to complete work |

| Skill | Description |
|-------|------------------------------|
| | tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB513 Monitor compliance with copyright and licence requirements.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS503 Monitor compliance with copyright and licence requirements

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- monitor compliance with copyright legislation on at least two occasions
- monitor licenses for digital rights management on at least two occasions
- assess risks associated with donated and culturally sensitive material on at least two occasions.

In the course of the above, the candidate must:

- source information about copyright relevant to a range of organisations
- refer to policies, procedures and licences to ensure compliance with legislation
- identify procedures to minimise risk of infringements of copyright and licence conditions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- copyright and licensing laws and regulations relating to an organisation
- key aspects of licensing and role of collecting societies
- features of open source copyright licences
- organisational policies, protocols and procedures on copyright, licences and digital rights management
- rights of copyright owners, including digital rights management
- relevant sources of information and advice on copyright
- protocols for handling donated and culturally sensitive material.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to copyright
- organisational policies and procedures relevant to performance evidence
- agreements and licences.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS504 Maintain digital repositories

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to populate and manage digital collections of information resources.

The unit applies to individuals, working autonomously within established guidelines, with significant technical skills and knowledge in using, maintaining, improving and describing content and context of digital collections according to organisational and system guidelines.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Maintain knowledge of digital repositories | 1.1 Research information sources and determine types and functions of digital repositories 1.2 Review organisational procedures on digital repositories and confirm consistency with organisational policies 1.3 Identify external standards and requirements relevant to preservation and copyright of digital repositories |
| 2. Manage resources for digital repositories | 2.1 Locate and verify resources to add to the digital repository 2.2 Add resources to the digital repository using relevant software applications and equipment 2.3 Maintain digital resources and confirm access and integrity 2.4 Remove or modify resources from the digital repository, where |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | required, according to organisational policies and procedures |
| 3. Manage metadata for digital repositories | 3.1 Create descriptive, technical and administrative metadata for digital repository resources according to organisational policies and procedures 3.2 Maintain and enhance digital repository metadata according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and critically analyses complex text to appropriately apply material to new or existing resources and distinguishes significant information from minor references |
| Writing | <ul style="list-style-type: none"> Provides clarity of meaning to directive and instructional text, and conveys detailed, accurate and concise descriptions of complex data |
| Oral Communication | <ul style="list-style-type: none"> Uses clear and specific language to convey technical and complex information and instructions to colleagues |
| Numeracy | <ul style="list-style-type: none"> Correctly interprets and provides numerical information embedded in complex information sources |
| Planning and organising | <ul style="list-style-type: none"> Accepts responsibility for planning, prioritising and sequencing complex tasks and workload |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others and shares information to optimise efficiency of operations |
| Technology | <ul style="list-style-type: none"> Uses features of digital tools to complete complex tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB506 Maintain digital repositories.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS504 Maintain digital repositories

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- add to digital repository according to standards and organisational policies and procedures on at least two occasions
- create metadata on at least two occasions.

In the course of the above, the candidate must:

- add to, modify or remove resources from digital repositories using standards and organisational policies and procedures, and ensure access and integrity
- create and edit metadata for digital repository resources
- modify resource in digital repository according to standards and organisational policies and procedures
- remove resource from digital repository according to standards and organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- access and preservation standards for digitisation
- copyright, moral rights, digital rights management and intellectual property issues and legislation that impact digital repositories
- common digital file formats
- digital preservation techniques
- information management principles for description and access
- current trends in digital repositories
- reference metadata standards and systems used in the industry institutions, including:
 - Resource Description and Analysis (RDA)
 - Australian Government Location Service (AGLS)

- Dublin Core
- Machine Readable Cataloguing (MARC) and MARC21
- organisational policies and procedures regarding digital repositories.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- industry-current systems and technologies for digital repositories relevant to performance evidence
- organisational policies, procedures and metadata standards.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS505 Provide subject access and classify material

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to analyse and classify complex material through the application of bibliographic organisation methods and the ability to use interpretation and judgement to deviate from precedents where necessary.

The unit applies to information services professionals with highly developed technical skills who work autonomously to facilitate customer access to information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Analyse and create subject headings | 1.1 Analyse subject content of material using knowledge of general concepts and principles of bibliographic control, relevant standards and customer needs 1.2 Identify and select subject headings according to relevant standards 1.3 Construct sufficient headings to enhance access to information using standards and authorities lists 1.4 Consult with relevant stakeholders to determine systematic and reasonable approaches to cataloguing complex material |
| 2. Classify material | 2.1 Use chosen classification systems to reflect knowledge of principles of organisation |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>2.2 Select a classification number consistent with classification system that reflects understanding of subject content and provides ready access for relevant stakeholders</p> <p>2.3 Check catalogues for previously assigned classification numbers for similar items</p> |
| 3. Facilitate continuous improvement of classification and assignment skills | <p>3.1 Maintain and apply knowledge of changes in classification and assignment practices to enhance classification consistency and quality</p> <p>3.2 Consult with colleagues regarding issues with classification and assignment system operations or procedures and take relevant action</p> <p>3.3 Report on action taken to rectify issues with classification and assignment system</p> <p>3.4 Comply with relevant classification and assignment practice standards</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Organises, analyses, evaluates and applies content from a range of structurally complex texts |
| Writing | <ul style="list-style-type: none"> Utilises sophisticated writing skills to summarise information from multiple sources and express precise meaning appropriate to audience and context |
| Oral Communication | <ul style="list-style-type: none"> Employs active listening skills to ensure understanding and expresses ideas and concepts in a manner and form appropriate to the audience |
| Numeracy | <ul style="list-style-type: none"> Identifies and comprehends relevant mathematical information in familiar activities or texts |
| Initiative and enterprise | <ul style="list-style-type: none"> Seeks to improve policies and procedures to better meet organisational goals Contributes to continuous improvement of current work practices by applying basic principles of analytical and lateral thinking |
| Teamwork | <ul style="list-style-type: none"> Collaborates and cooperates with others to achieve joint outcomes |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises and implements work activities in line with organisational policies and procedures, and legislative requirements |

| Skill | Description |
|-----------------|--|
| Problem solving | <ul style="list-style-type: none">• Applies analytical processes to resolve technical or conceptual problems |
| Technology | <ul style="list-style-type: none">• Uses main features and functions of digital tools to classify material and complete other work tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB509 Provide subject access and classify material.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS505 Provide subject access and classify material

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- construct subject access points, accurately classify material, and review classification process on at least six occasions.

In the course of the above, the candidate must:

- analyse subject content for subject heading and classification purposes
- maintain and apply knowledge of record components
- demonstrate a collaborative approach to resolving complex problems
- demonstrate use of current industry subject heading and classification systems.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- purpose and function of various classification tools
- classification schemes relevant to work context
- subject access and control of methods, including:
 - authority control procedures
 - subject headings lists
 - thesauruses
- procedures for the application of authority systems and files
- methods of modifying and upgrading records to suit relevant stakeholder needs, including:
 - additional access points
 - establishing new authorities
- current industry trends relating to classification processes
- relevant standards.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational cataloguing standards, policies and procedures
- current industry cataloguing and classification tools, equipment, materials and industry software packages relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS506 Implement lending and borrowing processes for collections

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish and implement procedures for lending and borrowing collection material in library and information services environments.

The unit applies to individuals who possess specialised knowledge, have a degree of autonomy and are responsible for protecting the integrity of collection material.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review procedures for lending and borrowing collection material | 1.1 Confirm conditions and criteria for lending and borrowing collection material 1.2 Identify responsibility in relation to lending and borrowing collection material 1.3 Verify lending and borrowing procedures with relevant stakeholders |
| 2. Negotiate lending and borrowing of collection material | 2.1 Conduct negotiations with lenders and borrowers according to procedures according to organisational policies and procedures 2.2 Confirm loan or borrowing conditions and costs, and assess whether these can be met |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------|---|
| | 2.3 Assess risks for the organisation associated with lending or borrowing transactions and action accordingly 2.4 Complete and review written agreements ensuring consistency in negotiations and procedures 2.5 Arrange for execution of written agreements by relevant parties 2.6 Complete organisational records consistent with procedures |
| 3. Manage operations | 3.1 Instigate operational arrangements for lending and borrowing to proceed 3.2 Monitor operations and confirm lending and borrowing of collection material proceeds according to plan 3.3 Review lending and borrowing procedures on a regular basis and improve own performance, as required |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets workplace documentation and applies rules to borrowing transactions Checks prepared documentation for compliance with agreed terms and organisational procedures |
| Writing | <ul style="list-style-type: none"> Develops written agreements consistent with agreed outcomes and procedures Accurately maintains workplace records in line with organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges of ideas and elicits views and opinions of others by listening and questioning Uses clear language to contribute information and express requirements |
| Numeracy | <ul style="list-style-type: none"> Determines and monitors borrowing and lending costs and transactions in line with organisational procedures |
| Teamwork | <ul style="list-style-type: none"> Works independently and collectively in making decisions to achieve organisation outcomes |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for managing organisational procedures and systems relevant to own role Takes responsibility for planning and organising own workload, and considers how to link with the work of others |

| Skill | Description |
|------------|---|
| Technology | <ul style="list-style-type: none">• Uses main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB501 Manage lending and borrowing processes for collections.

Supersedes but is not equivalent to:

- BSBLIB401 Record and maintain collection information
- BSBLIB502 Manage the development of collections.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS506 Implement lending and borrowing processes for collections

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement lending and borrowing procedures for materials collection on at least two occasions.

In the course of the above, the candidate must:

- review procedures for lending and borrowing collection material
- work cooperatively with others involved in lending and borrowing collection material.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key procedures and practices for lending and borrowing collection material, both for specific items and whole collections
- legal, ethical and financial requirements for lending and borrowing collection material
- cultural protocols for lending and borrowing collection material, including those associated with Aboriginal or Torres Strait Islander cultural material
- purpose of subject matter expertise relevant to the work context
- key sources for lending and borrowing collection material in a given work context
- key aspects of resources for lending and borrowing collection material.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures

- a collection, for which procedures for lending and borrowing collection materials may be reviewed.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS507 Use advanced functions of integrated library management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to use and evaluate the functionality of integrated library management systems (ILMS) at an advanced level and to analyse the interrelated functions of an ILMS.

The unit applies to individuals working autonomously, within established policies and procedures, in functional areas of libraries. In some contexts, work may involve supervisory or team leader roles.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Extend expertise in use of ILMS | 1.1 Maintain currency of knowledge of basic functions and interrelation of different modules of an ILMS 1.2 Provide information to stakeholders regarding online catalogue and circulation systems |
| 2. Use advanced features of ILMS and assist customers | 2.1 Use advanced search features of online catalogues to locate information resources for relevant stakeholders 2.2 Use advanced circulation system functionality to resolve complex borrower problems and complaints 2.3 Provide information to relevant stakeholders regarding range of |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>services that may incur costs</p> <p>2.4 Inform relevant stakeholders of costs of services and refer complex customer transactions to relevant specialist</p> |
| 3. Use advanced ILMS functions for collection management | <p>3.1 Order and receive library resources using acquisitions systems and procedures</p> <p>3.2 Create reports using information from different modules</p> |
| 4. Evaluate functionality of ILMS | <p>4.1 Evaluate functions of existing ILMS in relation to relevant stakeholder and organisational needs</p> <p>4.2 Source and review information on current industry trends in relation to ILMS, including potential new systems, upgrades or add-ons</p> <p>4.3 Consult with relevant personnel and make recommendations regarding improvements to ILMS</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Critically organises, analyses, evaluates and applies content from a range of structurally complex texts |
| Writing | <ul style="list-style-type: none"> Accurately records information and completes documentation using required format, terminology and conventions specific to organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Employs active listening skills to ensure understanding and expresses ideas and concepts in a manner and form appropriate to the audience |
| Initiative and enterprise | <ul style="list-style-type: none"> Seeks to improve policies and procedures to better meet organisational goals |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for following organisational policies and procedures |
| Planning and organising | <ul style="list-style-type: none"> Plans and sequences complex activities, monitors implementation and manages relevant communication |
| Problem solving | <ul style="list-style-type: none"> Applies systematic and analytical decision-making processes for complex situations Uses problem-solving techniques to identify and analyse issues, to generate possible solutions, seeking input from others, as required |

| Skill | Description |
|------------|---|
| Teamwork | <ul style="list-style-type: none">Adapts personal communication style to build a positive working relationship, and shows respect for opinions, values and specific needs of others |
| Technology | <ul style="list-style-type: none">Utilises features of digital tools to complete complex tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB510 Use and monitor advanced functions of integrated library management systems.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS507 Use advanced functions of integrated library management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- source and evaluate information regarding two current industry trends in relation to integrated library management systems (ILMS) on at least two occasions
- use basic and advanced features of an ILMS to locate information resources for customers on at least three occasions
- evaluate functionality of an ILMS and make recommendations for improvements on one occasion.

In the course of the above, the candidate must:

- conduct basic and advanced online catalogue searches
- provide information to customers in a manner consistent with organisational policies and procedures
- create records in an ILMS.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- basic operation of automated library management systems (ILMS), including interrelation between cataloguing, circulation, online catalogue and acquisitions modules
- basic and advanced features of automated library management systems, including customer self-service systems and associated technologies
- implications of relevant workplace policies, procedures and costs in relation to lending and circulation services
- procedures for handling money and security
- best practice customer service policies and procedures
- impact of relevant legislation on provision of library and information services.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures manuals relevant to performance evidence
- current industry systems, equipment, tools, materials and industry software packages relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS508 Research and analyse information to meet library customer needs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to provide customers with access to, and an analysis of, diverse and complex sources of information.

The unit applies to individuals working in public, corporate or institutional libraries, record management units, government departments, tourist information centres, community advisory organisations or other library and information services contexts. These individuals respond to complex information needs, working autonomously and consulting relevant stakeholders.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Analyse information needs | <ul style="list-style-type: none">1.1 Determine information requirement with reference to relevant documentation or information from customers1.2 Conduct reference interviews with customers to determine specific information needs, including level, type and amount of information required1.3 Confirm complexity of customers' required information1.4 Formulate complex search strategies1.5 Identify and assess customer expectations in relation to available resources and likely constraints |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|---|
| | 1.6 Advise customers of likely outcomes of information search and possible delivery options 1.7 Review and revise search terms or topics in consultation with customers |
| 2. Implement search strategies | 2.1 Consider access to information sources when evaluating different search strategies 2.2 Select and prioritise information sources 2.3 Evaluate and select logical and reasonable strategies to locate difficult to find information 2.4 Consult with relevant stakeholders, where required, to identify information sources 2.5 Use advanced search techniques to locate relevant information 2.6 Assist customers to participate in search processes through practical demonstration of information-seeking skills |
| 3. Review quality of customer service | 3.1 Check information collected for its validity, reliability and suitability in relation to customer requirements and expectations 3.2 Communicate with customers regarding problems, difficulties, suitable alternatives and follow-up requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Critically organises, evaluates and applies content from a range of structurally complex texts |
| Writing | <ul style="list-style-type: none"> Prepares documentation and correspondence using clear language and correct spelling and terminology |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using active listening and questioning to clarify information Clearly explains detailed information using language, tone and pace appropriate to audience |
| Self-management | <ul style="list-style-type: none"> Takes personal responsibility for following explicit and implicit policies, procedures and regulatory requirements |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules complex activities, monitors implementation and manages relevant communication |
| Problem solving | <ul style="list-style-type: none"> Approaches decision-making in diverse ways involving others when appropriate and making unilateral decisions when required |

| Skill | Description |
|------------|---|
| Technology | <ul style="list-style-type: none">• Utilises features of digital tools to complete complex tasks• Uses digital tools safely, legally and ethically when gathering, storing, accessing or sharing information |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB511 Research and analyse information to meet customer needs.

Supersedes but is not equivalent to BSBCUE405 Survey stakeholders to gather and record information.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS508 Research and analyse information to meet library customer needs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- provide service to six customers, including:
 - analysing customer needs
 - implementing location strategy
 - reviewing quality of service.

In the course of the above, the candidate must:

- conduct reference interview
- analyse information to ensure suitability to meet customer needs
- apply knowledge of the organisation's reference, research and general collections
- apply knowledge of types and scope of databases and other accessible reference tools
- demonstrate effective interviewing, communication and negotiation with customers about information needs
- use a range of information sources and tools.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope and range of information sources available
- techniques for searching and retrieving information from a range of sources
- strategies for obtaining information from external agencies or specialist organisations
- range of available delivery options for presentation of information resources
- legal considerations relating to accessing information sources
- protocols associated with culturally sensitive material, including Aboriginal or Torres Strait Islander cultural material.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures documents relevant to performance evidence
- a range of information sources and information systems
- special purpose tools, equipment, materials and industry software packages relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS509 Promote literature and reading

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to research and implement strategies that encourage and enhance literature and reading in a wide variety of contexts. Particular emphasis is on improving the literacy of customers by creating environments that provide access to relevant and attractive reading material in a variety of formats to suit a range of ages, reading levels and needs.

The unit applies to individuals responsible for promoting literature and reading to clients as a way of meeting their needs. It applies in many industries, including libraries, information and cultural services, community services and health. Work is undertaken with limited supervision according to organisational guidelines.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Maintain knowledge about literature and reading | 1.1 Research promotion of literature and reading, and research its importance to society 1.2 Recognise reading levels and interests of various customer groups 1.3 Source reviews about relevant literature from a range of sources 1.4 Identify classification systems and shelving options for literary works and literary information for a range of formats |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 1.5 Update own knowledge of a broad range of literary works, publishing trends and formats 1.6 Share information collected on literary works, trends and formats with colleagues |
| 2. Implement a range of strategies to promote literature and reading | 2.1 Research methods used to organise and access literature collections 2.2 Develop own strategies to promote literature and reading and use current or emerging technologies 2.3 Interview and provide advice to customers to meet their literature and reading needs 2.4 Source information from a variety of sources to meet customer literature requests 2.5 Identify and assess strategies used by organisations to promote reading, and adapt as required for the organisation |
| 3. Monitor and evaluate effectiveness of strategies to promote literature and reading | 3.1 Monitor feedback of strategies implemented to promote literature and reading 3.2 Suggest methods to determine the effectiveness of strategies used to promote literature and reading 3.3 Recommend changes to strategies in response to evaluation of feedback |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Writing | <ul style="list-style-type: none"> Uses written text to develop hypotheses, explore complex issues, plan and problem-solve, as well as a functional tool to maintain records, share information and provide advice |
| Oral Communication | <ul style="list-style-type: none"> Utilises a range of oral structures to convey precise meaning Adapts language to audience, context and purpose |
| Initiative and enterprise | <ul style="list-style-type: none"> Seeks to improve policies and procedures to better meet organisational goals Uses analytical and lateral thinking to review current practices and develop new or improved processes, models and services |
| Teamwork | <ul style="list-style-type: none"> Cooperates with others and contributes to work practices where joint outcomes are expected |
| Technology | <ul style="list-style-type: none"> Uses a range of digitally based technology and applications to access |

| Skill | Description |
|-------------------------|---|
| | and filter data, and then extract, organise, integrate and share relevant information |
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB507 Promote literature and reading.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS509 Promote literature and reading

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions interview and provide advice to customers to meet their literature and reading needs.

In the course of the above, the candidate must:

- develop, implement and evaluate strategies to promote literature and reading
- meet customer literature requests
- promote use of an organisation's collections and resources
- share information collected on literature, trends and formats with colleagues
- monitor and evaluate effectiveness of strategies to promote literature and reading.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- concepts of literacy and literature and the role organisations play in promoting reading
- scope and arrangement of literature collections in libraries and related organisations
- relevant literature information sources located in publications, including:
 - blogs
 - catalogues
 - databases
 - websites
- key methods for arranging literature collections
- literature requests and strategies for answering requests
- literature reference resources and common application of each
- common categories and genres into which literature is divided.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- special purpose tools, equipment, materials and industry software packages relevant to performance evidence
- literature reference tools and resources
- current industry systems to research information on literature
- information about current and emerging technologies to promote literature.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS510 Develop community and stakeholder relationships in a library environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and maintain relationships with people and organisations in local communities through regular and ongoing consultation to maintain the quality of service provision.

The unit applies to individuals who work in a library or where there is a need for a proactive approach to establishing and building networks and relationships between organisations and stakeholders and who operate autonomously, often with managerial responsibility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan stakeholder consultation | 1.1 Review and assess current and potential stakeholders and determine needs, interests, priorities and trends, in consultation with colleagues 1.2 Identify relevant stakeholders and methods to establish and maintain contact 1.3 Research and maintain a collection of current relevant information on stakeholders 1.4 Check organisational plans for relevant reference to stakeholder interaction |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 1.5 Confirm that planning process takes account of relevant internal and external factors |
| 2. Establish stakeholder relationships | 2.1 Identify and assess a range of strategies to facilitate relationships between stakeholders and own organisation 2.2 Implement strategies and establish productive relationships with stakeholders 2.3 Determine purpose and parameters of specific consultations, and brief participants accordingly 2.4 Integrate information from stakeholder consultations into organisational planning and share with relevant colleagues 2.5 Monitor, evaluate, and continuously improve stakeholder relationships |
| 3. Represent organisation to local community | 3.1 Communicate organisational role accurately, confidently and clearly to promote stakeholder awareness 3.2 Promote organisation to relevant stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and analyses complex documents making connections to inform planning and strategy |
| Writing | <ul style="list-style-type: none"> Employs appropriate vocabulary and tone to effectively communicate to different audiences Uses appropriate forms and conventions to convey information clearly |
| Oral Communication | <ul style="list-style-type: none"> Articulates clearly and persuasively, listening to opinions of others and altering responses accordingly Participates in a verbal exchange of ideas and uses detailed, clear language to clarify and present information according to requirements and audience |
| Self-management | <ul style="list-style-type: none"> Works independently and collectively in making decisions to achieve organisational outcomes |
| Teamwork | <ul style="list-style-type: none"> Plays a lead role in collaborating, consulting and cooperating with stakeholders to promote an understanding of the organisation's role |
| Initiative and enterprise | <ul style="list-style-type: none"> Seeks to improve policies and procedures relevant to own role to better meet organisational goals |

| Skill | Description |
|-------------------------|---|
| Planning and organising | <ul style="list-style-type: none">Plans, organises, implements and reviews systems and processes for effective engagement with stakeholders |
| Problem solving | <ul style="list-style-type: none">Uses problem-solving techniques to identify and analyse issuesUses analytical and lateral thinking to identify opportunities to engage with and maximise involvement of stakeholders |
| Technology | <ul style="list-style-type: none">Uses main features and functions of digital tools to complete work tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB512 Develop and maintain community and stakeholder relationships.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS510 Develop community and stakeholder relationships in a library environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- establish and maintain relationships with three different stakeholder groups in a library environment.

In the course of the above, the candidate must:

- facilitate effective consultation with a broad range of stakeholders relevant to the industry.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- promotion, advocacy and networks in libraries
- stakeholder groups, including special needs and cultural considerations
- key features, costs and benefits of different consultation mechanisms
- networking techniques and strategies
- relevant organisational policies and procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- strategic plans and relevant policies and procedures manuals
- resources to implement consultation processes
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS511 Develop and promote library activities, events and public programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan, develop and promote activities, events and public programs for different customer groups.

The unit applies to individuals who work in a broad range of industry contexts and who focus on short-term planning and promotion of an activity, event or public program, and may have responsibility for the work outcomes of others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish scope of public programs | 1.1 Identify activities, events or public programs that meet current or future organisational requirements and policies 1.2 Assess external influences that may impact development of programs 1.3 Research customer needs and wider community needs 1.4 Establish educational, interpretive and commercial objectives in consultation with relevant stakeholders |
| 2. Develop concepts for public programs | 2.1 Develop and document concepts for storylines, interpretive messages and themes 2.2 Integrate cultural and environmental protocols into concept |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | development 2.3 Identify and use specialists, as required 2.4 Prepare and present proposals for approval consistent with organisational procedures |
| 3. Prepare to stage activities, events and public programs | 3.1 Obtain resources required to complete activity, event or public program 3.2 Prepare timeframes with relevant parties, and take steps to coordinate with other activities 3.3 Confirm facilities are capable of delivering activities to the specified range of users, and provide a suitable and safe environment 3.4 Confirm suitable resources are available to operate the required facilities 3.5 Undertake risk audits, including copyright issues, and take action according to organisational policies and procedures 3.6 Identify trends in libraries and methods of online promotion |
| 4. Organise publicity | 4.1 Identify suitability of existing promotional materials for activities, events and public programs and audience 4.2 Contribute to development of strategies that target audiences according to organisational policies and procedures 4.3 Confirm material contains valid and reliable information |
| 5. Evaluate programs | 5.1 Collect and provide feedback from, and to, relevant stakeholders 5.2 Modify activities according to feedback received and use feedback to inform future development 5.3 Establish and implement ongoing review mechanisms for continuous improvement of programs |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Recognises and interprets different texts that meet requirements of the organisation |
| Writing | <ul style="list-style-type: none"> Prepares specific information which conveys an understanding of outcomes and alternatives, and uses terminology appropriate to present to relevant personnel |

| Skill | Description |
|-------------------------|---|
| Oral Communication | <ul style="list-style-type: none">Participates in a verbal exchange of ideas and uses detailed and clear language to clarify and present information according to requirements and audience |
| Numeracy | <ul style="list-style-type: none">Uses basic mathematical calculations to allocate and track resources to meet requirements within a set timeframe |
| Self-management | <ul style="list-style-type: none">Takes full responsibility for following policies and proceduresAccepts responsibility for risk management, applying problem solving processes to determine solutions |
| Problem solving | <ul style="list-style-type: none">Uses problem solving techniques to identify and analyse issues |
| Teamwork | <ul style="list-style-type: none">Collaborates and cooperates with others to achieve joint outcomes |
| Organising and planning | <ul style="list-style-type: none">Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others taking into account capabilities, efficiencies and effectiveness |
| Technology | <ul style="list-style-type: none">Uses main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB503 Develop and promote activities, events and public programs.

Supersedes but is not equivalent to:

- BSBEDU305 Assist with international education events and programs
- BSBLIB504 Develop exhibition concepts.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS511 Develop and promote library activities, events and public programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on two occasions research, plan, develop and promote an activity, event, or public program that is part of a wider public program promoted through libraries.

In the course of the above, the candidate must:

- conduct and evaluate effectiveness of activities, events or public programs.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- typical policies, procedures and practices relating to provision of activities, events and public programs
- sustainable practice and its relevance to development of public programs
- relevant sources of advice and specialist assistance for activity development
- techniques for planning and scheduling activities, events and public programs
- key resources for planning, promoting, delivering and evaluating activities, events and public programs
- cultural protocols to be observed in developing programs, including those relating to Aboriginal or Torres Strait Islander contexts
- copyright, moral rights, privacy and intellectual property issues and legislation that impact development of activities, including those relevant to Aboriginal and Torres Strait Islander cultures, child protection and trade practices.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational documentation, equipment and resources relevant to the activity, event or public program
- realistic workplace constraints, such as:
 - budget
 - space limitations
 - resource constraints
 - availability of staff.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS512 Monitor business records systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to set up the operational frameworks for the creation, capture and use of records and to monitor and review these frameworks and activities within an organisation.

The unit applies to individuals who work closely with other staff members in an organisation and may also have a degree of individual responsibility and autonomy. They use a range of organisational, analytical and managerial techniques to perform their work in business and records systems or in specialist information management environments, such as archives.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify requirements or modifications | <ul style="list-style-type: none">1.1 Identify and document core business, supporting activities, resources, business and social context, using observation and consultation1.2 Identify organisational functions and activities for which records must be kept1.3 Identify security and access requirements for records system content from analysis of organisation's activities1.4 Analyse organisational reporting and accountability requirements in the context of the business documentation |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| 2. Develop information management system | <p>2.1 Select or develop a metadata standard to be applied to all records as they are captured into the records management system</p> <p>2.2 Specify technological, internal controls, maintenance, disposal and updating requirements of prospective records system according to scale and nature of business operations</p> <p>2.3 Select cost structure for business or records systems relevant to size, nature, and organisational cash flow requirements</p> |
| 3. Develop an implementation plan | <p>3.1 Identify and document information management responsibilities of individual personnel or organisational units</p> <p>3.2 Develop measurable performance indicators for information management activities</p> <p>3.3 Contribute to the development of policies and procedures for capturing and controlling records</p> <p>3.4 Communicate implementation plan to users of the system and other relevant organisational staff</p> |
| 4. Monitor and review business or records system | <p>4.1 Monitor records system and notify staff according to implementation plan</p> <p>4.2 Record details of variation from implementation plan</p> <p>4.3 Provide required reports to relevant authority relating to use and maintenance of records</p> <p>4.4 Designate responsibilities to staff for record creation and capture activities in accordance with organisational policies and procedures</p> |
| 5. Review and respond to problems and changes | <p>5.1 Use monitoring reports and external events to identify any issues that require a systemic response</p> <p>5.2 Make recommendations for revisions to systems, procedures, and strategic plans in response to identified issues</p> <p>5.3 Make and review amendments to system and implementation plan, where required</p> <p>5.4 Prepare recommendations for system amendments, planning and implementation</p> <p>5.5 Authorise procedures for using the business or records systems, and for any subsequent amendments to the procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none">Evaluates and interprets information from a range of relevant sources and identifies relevant and key information |
| Writing | <ul style="list-style-type: none">Creates documents to convey information and instructions using language and format appropriate to text and audience |
| Oral Communication | <ul style="list-style-type: none">Uses active listening and questioning techniques to confirm and clarify informationCommunicates using words and non-verbal features appropriate to the audience and context |
| Numeracy | <ul style="list-style-type: none">Interprets, compares and contrasts numerical data to determine needsUses numerical systems associated with record storage systems |
| Planning and organising | <ul style="list-style-type: none">Uses understanding of organisational requirements in planning an appropriate information management systemSequences and schedules tasks required to achieve outcomes and manages relevant communication |
| Technology | <ul style="list-style-type: none">Uses digital systems to develop and monitor business records system |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG502 Manage and monitor business or records systems.

Supersedes but is not equivalent to:

- BSBRKG505 Document or reconstruct a business or records system
- BSBRKG604 Determine security and access rules and procedures.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS512 Monitor business records systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, implement and review one records system for an organisation or work area.

In the course of the above, the candidate must:

- identify the requirement for a business records system
- document the steps used to determine the criteria for a records system appropriate to the organisation's business functions and reporting requirements
- develop an implementation plan.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key principles and processes of records management and records management systems
- internal controls required of the business or records system
- key characteristics of the organisational functions, structure and culture relevant to implementation of records system
- organisational policies and procedures relevant to performance evidence
- common problems relating to business records systems that require a systemic response.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS513 Contribute to records management framework

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to define, identify and contribute to the information management framework for an organisation or business unit at functional level.

The unit applies to individuals who use analytical skills and specialist knowledge of information management systems and business areas to develop frameworks to support business operations. The individual may have responsibility for a team or sole responsibility for their work within the business system.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish regulatory and social environment | 1.1 Identify and document legal and regulatory framework for the organisation according to industry standards 1.2 Analyse and document relevant information management legislation requirements 1.3 Review documentation of organisational functions for compliance, accountability, objectives and sustainability 1.4 Analyse broad social context in which the organisation operates and determine community expectations |
| 2. Identify records management areas of | 2.1 Review and update organisation's risk analyses and identify implications for record creation and retention |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| risk and update strategy | 2.2 Identify and document the risks and liabilities that records management frameworks are required to reduce |
| 3. Identify records management requirements for each business function | 3.1 Identify and analyse risks, liabilities and regulatory requirements for each business function 3.2 Document and communicate determined record requirements for each business function 3.3 Create and maintain guidelines to assist organisation employees to create, capture and maintain required records |
| 4. Assist in establishing records management framework for organisation | 4.1 Develop and communicate an overview of responsibilities for information management within the organisation 4.2 Define records management responsibilities for each business function 4.3 Define relevant stakeholders' responsibilities according to regulatory requirements and organisational policies and procedures 4.4 Integrate identified risks and liabilities managed by information management with the definition of responsibilities for each function 4.5 Communicate documented framework including areas of risk, regulatory requirements, records requirements and responsibilities for information management review and endorsement, to relevant stakeholders 4.6 Assist in the development of a review process and charge relevant stakeholders with maintaining the currency of the organisation's information management framework |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Researches, analyses and evaluates information from a range of complex texts against specific requirements to determine organisational needs |
| Writing | <ul style="list-style-type: none"> Prepares logically structured documentation that integrates complex concepts, processes and relationships and meets required organisation practice and standards Uses clear language and terminology to effectively convey information appropriate for purpose and audience |

| Skill | Description |
|-------------------------|--|
| Oral Communication | <ul style="list-style-type: none">• Presents information using language and non-verbal features appropriate to audience• Uses listening and questioning skills to clarify information and confirm understanding |
| Planning and organising | <ul style="list-style-type: none">• Develops plans to manage complex, non-routine tasks with an awareness of how they contribute to the overall organisation |
| Problem solving | <ul style="list-style-type: none">• Recognises and addresses unfamiliar problems of increasing complexity within own scope |
| Technology | <ul style="list-style-type: none">• Understands the uses of digital tools and technologies in the information management process |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG601 Define recordkeeping framework.

Supersedes but is not equivalent to:

- BSBRKG506 Develop and maintain terminology and classification schemes
- BSBRKG605 Determine records requirements to document a function
- BSBRKG607 Document and monitor the record creating context
- BSBRKG608 Plan management of records over time.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS513 Contribute to records management framework

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- define, identify and contribute to the records management framework for an organisation or work area.

In the course of the above, the candidate must:

- analyse information from a range of sources to identify how records management framework can address compliance requirements, risks and liabilities arising from:
 - legislation and regulations that apply to the organisation
 - social context
 - business functions within the organisation
- assist the development and implementation of a framework for records management to meet the identified issues and needs including:
 - rights, responsibilities, accountabilities and authorities
 - specific records and evidence to be kept
 - technologies, standards and processes for records management
- contribute to processes and responsibilities for management and review of the records management framework.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, regulations and standards applicable to the organisation
- key principles and processes of records management
- organisational business functions, structure and culture related to records management
- relevant industry standards.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to records management
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS514 Contribute to records retention and disposal schedule

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to determine and document retention periods and disposal actions for existing and future records created, received and maintained by an organisation in the course of business.

The unit applies to individuals who use analytical skills and specialist knowledge of information management systems and business areas to support organisational operations. The individual may have responsibility for a team or sole responsibility for their work within the business system.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Analyse information management requirements | 1.1 Research and analyse information management environment and legal, business and societal context for the organisation 1.2 Establish and document organisation's relevant accountability and information requirements 1.3 Analyse a range of documentation sources, and identify existing relevant information management requirements 1.4 Review and update risk analysis for the organisation, as required, in accordance with relevant standards 1.5 Research and analyse usage patterns of existing records to |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>identify users, and periods and purposes of use</p> <p>1.6 Consult and document user views on their needs and accessibility of the records</p> <p>1.7 Update and document relevant information management requirements according to review analysis and consultation of users</p> |
| 2. Identify required disposal status of records | <p>2.1 Identify and review the organisation's business processes from existing functional analyses or consult relevant stakeholders</p> <p>2.2 Establish relevant information management activities in the functional analysis</p> <p>2.3 Develop and document disposal classes according to the boundaries of the transactions and activities which make up the organisation's processes</p> <p>2.4 Develop disposal status and retention periods for each disposal class from an analysis of relevant documentation sources, legal requirements, access classifications, user consultation and review of risk analysis</p> <p>2.5 Review disposal status and retention periods for each disposal class in relation to the relevant use of the records, the relationship with other organisational activities, and other relevant requirements</p> <p>2.6 Describe disposal actions for each disposal class in the relevant documentation</p> |
| 3. Document disposal status and retention periods | <p>3.1 Test and confirm retention and disposal documentation contains details of business activities, records classes, and required disposal actions</p> <p>3.2 Identify and assign responsibility for implementing disposal actions for records from retention and disposal documentation</p> <p>3.3 Describe disposal class and status, and disposal actions in the approved retention and disposal documentation</p> <p>3.4 Compile and retain documentation of the analysis and related information with the approved retention and disposal documentation</p> <p>3.5 Submit retention and disposal documentation for approval to relevant individual or body</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Critically analyses documentation from a variety of sources to identify specific criteria and consolidates information to determine requirements |
| Writing | <ul style="list-style-type: none"> Uses language, concepts, formatting and terminology appropriate to organisation and purpose to convey explicit information |
| Oral Communication | <ul style="list-style-type: none"> Uses active listening and questioning techniques to obtain and clarify information from record users |
| Numeracy | <ul style="list-style-type: none"> Performs mathematical calculations to analyse usage data and to interpret patterns and trends Measures periods of time by performing basic mathematical calculations |
| Self-management | <ul style="list-style-type: none"> Monitors adherence to organisational policies, standards, and all legislative and regulatory requirements Considers own role in terms of its contribution to broader goals of the work environment |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer term operational and strategic goals |
| Problem solving | <ul style="list-style-type: none"> Recognises and addresses some unfamiliar problems of increasing complexity within own scope |
| Technology | <ul style="list-style-type: none"> Uses digital tools and technologies in the information management process |

Unit Mapping Information

Supersedes and is equivalent to BSBRKG606 Design a records retention and disposal schedule.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS514 Contribute to records retention and disposal schedule

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- research records created by an organisation and create a detailed retention and disposal schedule within legislative and organisational parameters that includes disposal classes applying to at least three organisational functions.

In the course of the above, the candidate must:

- work closely with record creators and users to determine their needs and access requirements
- complete documentation for submission to the relevant authority for approval.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, regulations and standards that affect information management systems
- relevant organisational, jurisdictional and subsidiary functions, activities, structure, policies, strategies and processes
- risk analysis applied to records systems
- key aspects of disposal actions and the circumstances in which each could be used
- key principles and processes of records management and records management systems.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to records retention and disposal

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS515 Participate in archiving activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to participate in analysis of archiving requirements, surveying, arranging, and describing collections and storing and using archives.

The unit applies to individuals involved in archiving roles in an organisation with archiving requirements, working autonomously but in consultation with other colleagues and wider stakeholders.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Select and acquire archival material | 1.1 Analyse organisation's functions and requirement for archiving according to legislation, regulations and organisational policies and procedures 1.2 Identify materials required for archiving according to analysis 1.3 Consult with relevant stakeholders and identify research value and access requirements 1.4 Collect relevant materials |
| 2. Control the collection | 2.1 Survey the received material 2.2 Describe and document context, size, scope and format of collected materials 2.3 Document access restrictions and requirements according to |

| | |
|---|---|
| | <p>legislation, regulations and organisational policies and procedures</p> <p>2.4 Allocate appropriate storage for the material</p> |
| 3. Arrange and describe collection | <p>3.1 Identify original order and arrangement of materials</p> <p>3.2 Sort and arrange material into original order, where required</p> <p>3.3 Identify relevant standards applicable to collection</p> <p>3.4 Describe materials in collection management system</p> <p>3.5 Create and document series and sub series and list items according to relevant standards and organisational policies and procedures</p> <p>3.6 Develop finding aid for archival material according to relevant standards and organisational policies and procedures</p> |
| 4. Store archives | <p>4.1 Determine whether archives are to be stored in an organisation or external facility</p> <p>4.2 Ensure facility provisions and characteristics are adequate and of archival standard and that security procedures are in place and implemented</p> |
| 5. Use archives | <p>5.1 Identify methods to provide access to the collection</p> <p>5.2 Develop procedures for identifying, requesting and returning archives from and to storage</p> <p>5.3 Ensure records are searchable and retrievable</p> <p>5.4 Provide a suitable secure environment in which archives may be examined according to established procedures</p> <p>5.5 Ensure that archives are in secure custody at all times</p> <p>5.6 Ensure access restrictions are applied when archival material is provided to users</p> |
| 6. Participate in preservation activities | <p>6.1 Use elements of preservation practices and conservation treatments for physical part of the collection</p> <p>6.2 Describe steps in planning for disasters, and implement steps, where required</p> <p>6.3 Identify and use key concepts and steps in digital preservation</p> <p>6.4 Prepare and implement preservation plans for format types and or systems</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------|-------------|
|-------|-------------|

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none">Identifies, interprets, analyses and reviews information from a range of texts and other sources |
| Writing | <ul style="list-style-type: none">Develops list of information management requirements in required formatInputs information to create, identify, retrieve or modify records |
| Oral Communication | <ul style="list-style-type: none">Communicates to exchange information with others using questioning and careful listening to clarify requirements |
| Numeracy | <ul style="list-style-type: none">Interprets and analyses numerically expressed information from records to determine their classification and management requirements |
| Self-management | <ul style="list-style-type: none">Takes responsibility for following organisational policies and procedures |
| Planning and organising | <ul style="list-style-type: none">Sequences and schedules tasks required to achieve outcomes according to organisational policies and procedures |
| Technology | <ul style="list-style-type: none">Uses digital systems and tools to access, organise, analyse and display records, showing awareness of the need for data security |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS515 Participate in archiving activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- analyse archiving requirements, survey, arrange, describe, store, and use archives according to organisational policies and procedures on at least two occasions.

In the course of the above, the candidate must:

- identify materials as archives according to analysis
- assess size and scope of materials in archival custody
- consult with relevant stakeholders.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key aspects of legislation, regulations and organisational policies and procedures relevant to archiving
- required methods for describing collections
- methods for analysing materials
- key considerations when migrating digital records
- key aspects of research value of materials.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant policies and procedures manuals and collection usage data
- relevant statistical information.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS516 Undertake cataloguing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate and design systems and structures related to copy and original descriptive cataloguing; to search, retrieve and edit material from existing records and to undertake catalogue maintenance. This requires application of a sound knowledge of cataloguing standards and systems.

The unit applies to individuals in information services organisations, working according to established procedures and guidelines, with responsibility for maintaining catalogues, as well as for copy and original descriptive cataloguing.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Construct bibliographic descriptions | 1.1 Identify and apply relevant standards and accepted variations when cataloguing material 1.2 Create original catalogue records for a variety of formats and check authority files following relevant standards 1.3 Confirm created records include sufficient and relevant access points for ease of retrieval by catalogue users 1.4 Construct descriptions to suit customer needs according to automated system and organisational procedures 1.5 Create item record and statement of holdings |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| 2. Coordinate location, retrieval and transfer of bibliographic information and records | 2.1 Search own cataloguing database and identify availability of existing bibliographic records for same or similar items 2.2 Search external catalogues or databases, locate suitable bibliographic records, download and create copy catalogue records in local system 2.3 Download and upload bibliographic records to local system in line with organisational techniques and procedures |
| 3. Edit bibliographic records | 3.1 Check downloaded bibliographic records for accuracy and compliance with local cataloguing procedures 3.2 Edit downloaded records according to system and organisational procedures 3.3 Add item to records and holdings statements |
| 4. Maintain cataloguing records | 4.1 Undertake relevant catalogue maintenance to preserve integrity of local database 4.2 Identify the need for authority records according to organisational policies and procedures 4.3 Consult with relevant stakeholders regarding cataloguing issues or problems and take required action |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets procedures and documents to inform actions and critically analyses texts to enable completion of tasks |
| Writing | <ul style="list-style-type: none"> Translates technical information from source material into a meaningful form and communicates relationships between ideas and information in a style appropriate to audience and purpose |
| Oral Communication | <ul style="list-style-type: none"> Conveys information related to work tasks clearly and succinctly and derives relevant information through engagement with colleagues in work-related discussions |
| Numeracy | <ul style="list-style-type: none"> Extracts and applies mathematical information embedded in a range of tasks and texts |
| Self-management | <ul style="list-style-type: none"> Takes personal responsibility for following explicit and implicit policies, procedures and cataloguing standards Accepts responsibility and ownership for tasks and makes decisions on completion parameters and the need for coordination with others |

| SKILL | DESCRIPTION |
|-------------------------|---|
| Teamwork | <ul style="list-style-type: none">Collaborates and cooperates with others to achieve joint outcomes |
| Technology | <ul style="list-style-type: none">Uses a range of digitally based technologies to access, extract and share relevant information to achieve required outcomes |
| Planning and organising | <ul style="list-style-type: none">Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS516 Undertake cataloguing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- create at least three catalogue records
- edit at least three catalogue records.

In the course of the above, the candidate must:

- use current industry systems
- complete activities according to organisation policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- reference cataloguing standards and systems according to organisation policies and procedures
- commonly used automated cataloguing systems and shared cataloguing networks
- frequently occurring cataloguing problems
- principles of bibliographic description and access
- methods of preparing original and copy cataloguing records
- procedures for maintaining cataloguing records
- key aspects of required digital technologies and systems.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures relevant to performance evidence

- current industry cataloguing tools, systems and standards.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS601 Manage knowledge and information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and maintain information and data systems to support decision making, and to optimise the use of knowledge and learning throughout the organisation.

The unit applies to individuals who are responsible for ensuring that critical business information is readily available to review the organisation's performance and to ensure its effective functioning. It applies to a wide range of information assets such as business performance data, customer feedback, statistical data and financial data.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Collect relevant business information | 1.1 Review staff and customer feedback and business performance data 1.2 Identify, define and analyse business issues 1.3 Identify information required to reach a decision on issues 1.4 Source and collect relevant, reliable information 1.5 Confirm information is reliable and valid and reject where contradictory or ambiguous 1.6 Consult relevant stakeholders and collect and review relevant knowledge |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| 2. Analyse information and knowledge | <ul style="list-style-type: none">2.1 Create clear, relevant and consistent objectives for analysis according to organisational requirements2.2 Identify and interpret patterns and emerging trends according to organisational requirements2.3 Use and interpret statistical analyses, where required2.4 Use sensitivity analysis on relevant options2.5 Document approach to analysis of information and knowledge and conclusions drawn2.6 Adjust information and knowledge management decision support systems, where required |
| 3. Decide rectification for business issues | <ul style="list-style-type: none">3.1 Confirm sufficient valid and reliable information is available to support decisions3.2 Use risk management plans to determine acceptable courses of action3.3 Use relevant quantitative methods to assist decision making3.4 Consult specialists and other relevant stakeholders3.5 Make decisions and confirm decisions are consistent with organisational objectives, values and standards |
| 4. Distribute information to the organisation | <ul style="list-style-type: none">4.1 Confirm information requirements are documented and according to organisational requirements4.2 Document information and update databases4.3 Design and test systems to meet information requirements of relevant stakeholders4.4 Confirm information and knowledge systems are current, accurate, relevant and sufficient for relevant stakeholders4.5 Develop communication plan4.6 Distribute information to relevant stakeholders according to organisational policies and procedures4.7 Monitor and update communication distribution plans4.8 Maintain relevant knowledge and support security of information |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------|-------------|
|-------|-------------|

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Organises, evaluates and critiques ideas and information from a wide range of complex textsDraws on a broad range of strategies to build and maintain understanding throughout complex texts |
| Writing | <ul style="list-style-type: none">Generates complex written texts, demonstrating control over a broad range of writing styles and purposeDemonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning |
| Oral Communication | <ul style="list-style-type: none">Encourages discussions and applies appropriate listening and questioning techniques while consulting with othersPresents complex information in formal situations using language, tone and pace appropriate for the audience and purpose |
| Numeracy | <ul style="list-style-type: none">Uses numeracy skills to interpret complex statistical and researched information, performing calculations on data to render it usable and reportable |
| Self-management | <ul style="list-style-type: none">Works autonomously making high level decisions to achieve and improve organisational goals |
| Planning and organising | <ul style="list-style-type: none">Plans and manages activities with implications for the whole organisation |
| Initiative and enterprise | <ul style="list-style-type: none">Makes high impact decisions, analysing input from a range of sources and, where appropriate, drawing on experienceExplores new and innovative ideas through analysis and critical thinking |
| Technology | <ul style="list-style-type: none">Uses digital technologies to manage knowledge and information and actively investigates new technologies for strategic and operational purposes |

Unit Mapping Information

Supersedes and is equivalent to BSBINM601 Manage knowledge and information.

Supersedes but is not equivalent to:

- BSBLIB505 Develop disaster management plans
- BSBLIB605 Analyse and describe specialist and complex material
- BSBMGT801 Direct the development of a knowledge management strategy for a business
- BSBRKG603 Prepare a functional analysis for an organisation.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS601 Manage knowledge and information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage knowledge and information for an organisation or work area.

In the course of the above, the candidate must:

- source and analyse information for business decisions including:
 - identifying business problems and issues and related knowledge and data requirements
 - confirming the clear and relevant objectives for analysis of information
 - applying statistical analysis, sensitivity analysis and other techniques to draw conclusions relevant to decisions
 - ensuring sufficient valid and reliable information or evidence is available to support decisions
 - identifying and accessing sources of reliable information
 - using applicable technology
 - carrying out consultation with stakeholders and specialists
- contribute information and the outcomes of analysis to decision making
- distribute information to relevant stakeholders
- design, test and adjust information systems to meet needs and objectives.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- existing and emerging technologies and how they can be used in knowledge and information management
- statistical analysis and other quantitative methods commonly used in decision making, including:
 - correlation calculations

- short, medium-term and long-term trend analyses
- probability assessment
- dynamic programming
- linear programming
- queuing theory
- simulation
- key features of management information systems and decision support systems
- risk management plans and procedures for using to determine acceptable courses of action.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to managing knowledge and information
- workplace documentation and resources relevant to performance evidence
- relevant technology and equipment.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS602 Extend own information literacy skills to locate information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to research, analyse and communicate information, ideas and concepts at a complex level, as well as evaluate and continuously improve personal information literacy skills to optimally service requests for information from relevant stakeholders.

The unit applies to individuals operating autonomously with limited guidance from others, in any industry sector with particular relevance to those working in the library and information services sectors. It also applies to occupations required to use technology to locate information for relevant stakeholders from information sources.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Apply information literacy skills to meet needs | 1.1 Identify information literacy concepts and what constitutes an information literate person 1.2 Identify exact nature and extent of information needs 1.3 Develop effective search strategies and select relevant search tools to locate information from primary, secondary and tertiary sources 1.4 Assess usefulness and relevance of information resources in |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | <p>relation to relevant information needs</p> <p>1.5 Evaluate search results and adjust search strategies to meet information needs</p> |
| 2. Provide relevant stakeholders with search results | <p>2.1 Assess search results and select relevant information to meet purpose</p> <p>2.2 Compile reference lists and bibliographies of relevant information resources according to relevant referencing styles in format according to organisational policies and procedures</p> <p>2.3 Select communication methods for presenting information to relevant stakeholders according to nature and purpose of requests and intended audience</p> <p>2.4 Communicate with relevant stakeholders in relation to information requests according to organisational policies</p> <p>2.5 Acknowledge copyright and licensing issues related to access and use of information</p> |
| 3. Evaluate own work and skills | <p>3.1 Track development of own information literacy skills in relation to information literacy process</p> <p>3.2 Plan and implement strategies and opportunities to support lifelong learning</p> <p>3.3 Evaluate own information literacy skills against own career goals</p> <p>3.4 Update knowledge of current and emerging technologies that impact information literacy skills</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Evaluates credibility and relevance of texts to meet needs Integrates prior knowledge with concepts from multiple sources and recognises distinguishing structures, layout, features and conventions of a broad range of complex text types as an aid to locating information |
| Writing | <ul style="list-style-type: none"> Utilises text type, structure and language that is accurate and effective to suit audience and need and organises content appropriate for purpose and context |
| Oral Communication | <ul style="list-style-type: none"> Utilises active listening strategies to maintain understanding and determine information requirements and conveys precise meaning |

| Skill | Description |
|-----------------|---|
| | when providing information |
| Self-management | <ul style="list-style-type: none">• Accepts responsibility for planning and sequencing complex tasks and workload |
| Problem solving | <ul style="list-style-type: none">• Uses problem-solving techniques to identify and analyse issues |
| Technology | <ul style="list-style-type: none">• Uses a range of digitally based technology and applications to access and filter data, and then extract, organise, integrate and share relevant information in effective ways |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB604 Extend own information literacy skills to locate information.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS602 Extend own information literacy skills to locate information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- select, evaluate, and present information resources to meet three workplace information needs.

In the course of the above, the candidate must:

- select and refine search strategies and tools
- source and present varied complex information, ideas and concepts
- evaluate search results and take action to enhance final presentation to customer
- implement planned strategies to develop and extend own information literacy skills
- use a range of primary, secondary and tertiary sources to provide information in response to customer requests.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key concepts of information literacy
- range of information sources and technologies available to meet information requirements
- copyright, moral rights and intellectual property issues and legislation that impact research, use and distribution of information
- information and resources available for development of information literacy skills
- key principles of lifelong learning and how they relate to information literacy
- role of information literacy in different occupations in relation to lifelong learning.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant tools, equipment, materials and industry software packages.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS603 Initiate and lead applied research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan, conduct and report on applied research to influence strategic practices and outcomes within an organisational context. The unit also covers constructing an applied research strategy, using a range of applied research techniques, and analysing and presenting findings.

The unit applies to leaders or managers who use applied research to enhance individual, team and organisational performance. The intended purpose and approach to applied research may vary across a range of contexts and organisations. In this unit, the focus is on applied research to attain improved organisational outcomes.

No licensing, legislation or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan and develop an applied research strategy | 1.1 Clarify and confirm applied research purpose and requirements of relevant stakeholders 1.2 Identify policies and procedures in relation to conducting applied research 1.3 Establish methods for collecting and maintaining data in a systematic manner 1.4 Analyse factors affecting the reliability and validity of data 1.5 Review relevant research ethics and codes of conduct |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 1.6 Prepare applied research strategy and hypothesis 1.7 Frame a research strategy according to available tools and resources 1.8 Review and evaluate a range of applied research methods, theories and data collection techniques 1.9 Select methods to gather and analyse data according to research strategy |
| 2. Use a range of applied research techniques | 2.1 Use suitable technology and technology services to support data collection and analysis 2.2 Access sources of information and contributors relevant to the research 2.3 Confirm integrity of the data collected, and analysis tools used |
| 3. Analyse and present findings | 3.1 Evaluate how research findings such as trends and changes will impact on requirements of relevant stakeholders 3.2 Review data and research findings for accuracy of details and adherence to any legal requirements 3.3 Collate and analyse data for relevance against the original applied research strategy 3.4 Document and present research findings in a clear and logical manner consistent with stakeholder requirements 3.5 Identify the need for, and approach to, further research as required |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none"> Evaluates and reflects on the need for research to contribute to ongoing organisational improvement |
| Reading | <ul style="list-style-type: none"> Collects, analyses, compares and evaluates textual information from a range of resources to inform research strategies |
| Writing | <ul style="list-style-type: none"> Develops texts dealing with complex ideas and concepts Uses specialised and detailed language to convey explicit information, requirements and recommendations in accordance with legal, ethical and organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Uses specialised vocabulary appropriate to context and audience to discuss and confirm research requirements Applies listening and questioning techniques to check or confirm |

| Skill | Description |
|-------------------------|---|
| | understanding |
| Numeracy | <ul style="list-style-type: none">• Applies knowledge of mathematical information to statistically analyse data and identify possible trends and confirm reliability |
| Self-management | <ul style="list-style-type: none">• Takes responsibility for determining applicable organisational policies and procedures and considering legal and ethical obligations• Monitors adherence to legal and regulatory rights and responsibilities for self and others |
| Planning and organising | <ul style="list-style-type: none">• Develops plans for complex activities, regularly reviewing priorities and performance during implementation, identifying and addressing issues as they arise |

Unit Mapping Information

Supersedes and is equivalent to BSBRES801 Initiate and lead applied research.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS603 Initiate and lead applied research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan, conduct and report on applied research relevant to organisational strategic practices and outcomes on at least one occasion.

In the course of the above, the candidate must:

- formulate a research proposal or plan which includes:
 - specific research questions or hypotheses
 - valid population or sample size
 - description of the geographical, cultural, social or institutional context within which the research will be carried out
 - full description of the data collection methods
 - analysis of the limitations to research design including the reliability and validity of data
- document and present research findings including analysis of data, valid and reliable findings and recommendations for further research.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational communication processes and methods
- data collection and analysis methods, including the use of technology and technology services
- legal requirements, policies, procedures and guidelines relating to research
- common presentation techniques and reporting methods
- applied research tools and methods and how they are applied
- organisational policies and procedures relevant to performance evidence.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace policies and procedures relevant to performance evidence
- legislation and codes of conduct relevant to research.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBINS604 Contribute to collection management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist with the selection, acquisition and evaluation of collections and resource materials, and the development of policies and procedures that guide this work.

The unit applies to individuals involved in managing collections in a library or information services context to meet stakeholder needs, working autonomously but in consultation with other colleagues and wider stakeholders.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Information Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review use of collections | 1.1 Identify usage data as basis for collection policies, to reflect and predict client demands and changing needs 1.2 Conduct a community needs assessment to assist with developing collection to reflect current and future needs 1.3 Source information on current and emerging trends and formats relevant to customer needs in relation to collections |
| 2. Apply collection strategies and policies information | 2.1 Apply collection management policies in libraries and information services organisations and recommend additions to collections 2.2 Research and identify emerging trends and technologies, which |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|---|
| | <p>impact on access to the collection</p> <p>2.3 Source information about supply options for library resources</p> <p>2.4 Contribute to development of collection strategies that meet organisational objectives and customer needs</p> |
| 3. Select and deselect materials | <p>3.1 Source bibliographic information, format types, costs and reviews of resources from a range of sources</p> <p>3.2 Assess proposals according to organisational collection management policies</p> <p>3.3 Maintain processes to review collections in line with collection strategies and policies</p> <p>3.4 Identify allocation funding</p> <p>3.5 Follow organisational procedures for selection and deselection of resources</p> <p>3.6 Participate in weeding of materials according to established policies and practices, and recommend replacement titles, where required</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Synthesises and evaluates information from a broad range of complex texts and applies this knowledge to improve work practices and collections |
| Writing | <ul style="list-style-type: none"> Summarises complex information and conveys sophisticated and original ideas appropriately for context and audience |
| Oral Communication | <ul style="list-style-type: none"> Consults and negotiates with relevant stakeholders using detailed and clear language to contribute information and articulate ideas, and elicits views and opinions of others through active listening and questioning techniques |
| Enterprise and initiative | <ul style="list-style-type: none"> Seeks to improve policies and procedures to better meet organisational goals |
| Teamwork | <ul style="list-style-type: none"> Works independently and collectively in making decisions to achieve organisational outcomes Provides feedback to others to improve workgroup performance Provides support in field of expertise to team |
| Planning and | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and monitoring |

| | |
|-----------------|---|
| organising | complex tasks |
| Problem solving | <ul style="list-style-type: none">• Uses problem solving techniques to identify and analyse issues |
| Technology | <ul style="list-style-type: none">• Uses a range of digital technology and applications to access and filter data, and then extract, organise, integrate and share relevant information in effective ways |

Unit Mapping Information

Supersedes and is equivalent to BSBLIB603 Contribute to collection management.

Supersedes but is not equivalent to:

- BSBLIB601 Research and document collection material
- BSBLIB602 Develop and monitor procedures for the movement and storage of collection material.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBINS604 Contribute to collection management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- select and deselect materials according to collection strategies and policies on at least two occasions.

In the course of the above, the candidate must:

- identify usage data in relation to collection requirements
- conduct community needs analysis
- apply knowledge of collection strategies and policies that address requirements and constraints in specific workplace contexts
- make acquisition and disposal recommendations based on policies
- develop recommendations that address selection criteria for a variety of collections and formats.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- current and emerging trends in relation to library collections
- collection management policies and procedures, including:
 - selection, acquisition and deselection processes and procedures
 - weeding and stocktaking procedures
- information services trends and practices which impact on collection management.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures and collection usage data
- statistical information
- special purpose tools, equipment, materials and industry software packages relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR301 Support effective workplace relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to gather information and support effective relationships and networks, with particular regard to communication and representation.

The unit applies to individuals who use leadership skills to support the development of teams and help facilitate communication between team members.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Gather information and ideas | 1.1 Identify information on work roles and objectives of work team 1.2 Locate and communicate to work team organisational processes for communication and teamwork 1.3 Establish scope of own role 1.4 Seek contributions for refining ideas and approaches to teamwork and communication according to organisational processes 1.5 Identify and consult with team members on potential work-related issues |
| 2. Develop team relationships and networks | 2.1 Encourage communication within team according to organisation's social, ethical and business policies and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.2 Adjust interpersonal styles and methods in relation to the organisation's social and cultural environment 2.3 Identify and use workplace networks to help build relationships 2.4 Identify and describe the value of networks and other work relationships for the team and the organisation |
| 3. Contribute to positive team outcomes | 3.1 Identify issues to be rectified within own level of responsibility and according to organisational and legal requirements 3.2 Support colleagues in resolving work difficulties related to own level of responsibility, according to organisational and legal requirements 3.3 Review team outcomes and implement improvements in consultation with relevant personnel 3.4 Contribute constructively to conflict resolution according to organisational policies and processes |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Applies textual information to determine regulatory requirements and adhere to job processes and internal policies |
| Writing | <ul style="list-style-type: none"> Uses appropriate language to record key information related to the outcomes of the job Varies writing style to meet requirements of audience and purpose |
| Oral Communication | <ul style="list-style-type: none"> Speaks clearly using tone and pace appropriate for the audience and purpose Uses appropriate techniques, including active listening and questioning, to clarify information and to confirm understanding |
| Initiative and enterprise | <ul style="list-style-type: none"> Takes personal responsibility for adherence to explicit and implicit organisational policies, procedures, standards and legislative requirements within own job role and in all interactions with others |
| Teamwork | <ul style="list-style-type: none"> Adjusts personal communication style in response to diversity of individuals in the work context Implements strategies to respond appropriately to conflict and poor work performance |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks for own workload |

| | |
|------------|---|
| Technology | <ul style="list-style-type: none">• Uses familiar digital technologies and systems to access, present and communicate information |
|------------|---|

Unit Mapping Information

Supersedes and is equivalent to BSBFLM303 Contribute to effective workplace relationships.

Supersedes but is not equivalent to BSBEDU302 Assist in resolution of issues and incidents in an international education environment.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR301 Support effective workplace relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support the development of at least one team
- facilitate communication between individuals on at least two occasions.

In the course of the above, the candidate must:

- adjust interpersonal style and communications to respond to cultural and social diversity
- apply relationship management and communication skills with a range of people that:
 - demonstrate integrity, respect, empathy and cultural sensitivity and promote trust
 - forge effective relationships with internal and/or external people and help to maintain these networks
 - encourage participation and foster contribution of and respect for ideas and feedback
 - provide support to colleagues to resolve difficulties
- communicate ideas and information to diverse audiences.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- internal and external sources of information to improve organisational processes
- social and ethical requirements, and organisational policies and procedures relevant to communication
- legislative requirements relevant to communication
- strategies required to adapt communication for diverse audiences
- potential team issues including poor work performance
- examples of how work relationships and the cultural and social environment can support or hinder achieving planned outcomes
- techniques for developing positive work relationships and building trust and confidence in a team

- methods and techniques for communicating information and ideas to a range of stakeholders
- common problem-solving methods
- common methods to resolve workplace conflict
- process for monitoring, analysing and introducing ways to improve work relationships
- value of networks and work relationships for the team and the organisation
- own level of responsibility.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to workplace relationships.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR411 Demonstrate leadership in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead teams and individuals by modelling high standards of conduct to reflect the organisation's standards and values.

The unit applies to individuals who are making the transition from being a team member to taking responsibility for the work and performance of others and providing the first level of leadership within the organisation. These leaders have a strong influence on the work culture, values and ethics of the teams they supervise.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to demonstrate leadership | 1.1 Identify organisation's requirements for management performance 1.2 Identify qualities required for positive management performance according to organisational policies and procedures 1.3 Develop and implement performance plans for individual and team according to organisation's business objectives 1.4 Establish key performance indicators according to organisation's business objectives |
| 2. Align behaviour with | 2.1 Locate and assess organisation's standards and values for |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|---|
| organisational values | <p>conducting business</p> <p>2.2 Identify how own performance will contribute to upholding organisational values</p> <p>2.3 Identify issues to be resolved according to organisational values</p> <p>2.4 Gather and organise information relevant to the issues under consideration</p> |
| 3. Model leadership behaviour | <p>3.1 Facilitate individual's and team's active participation in team decision-making processes</p> <p>3.2 Examine options and assess associated risks to determine preferred course of action</p> <p>3.3 Develop plan to implement decisions agreed by relevant individuals and teams</p> <p>3.4 Use feedback processes to monitor the implementation and impact of decisions</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses text relating to organisational goals, standards and values to aid planning and decision making |
| Writing | <ul style="list-style-type: none"> Records and reports key information related to the organisational goals, standards and objectives Researches, plans and prepares documentation for relevant stakeholders |
| Oral Communication | <ul style="list-style-type: none"> Uses structure and language when developing performance plans, or when seeking and providing information about organisational goals and objectives |
| Numeracy | <ul style="list-style-type: none"> Identifies and comprehends mathematical information in familiar texts to establish key performance indicators |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies how own role meshes with others and contributes to broader work goals Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective outcomes Identifies the importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate |

| | |
|-------------------------|--|
| | with whom, why and how |
| Planning and organising | <ul style="list-style-type: none">• Develops plan to manage relatively complex, non-routine tasks with an awareness of how they contribute to longer term operational and strategic goals• Uses systematic, analytical processes in complex, non-routine situations, setting goals• Evaluates effectiveness of decisions in terms of how well they meet stated goals |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT401 Show leadership in the workplace.

Supersedes but is not equivalent to BSBMGT405 Provide personal leadership.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR411 Demonstrate leadership in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement at least two performance plans, including one relating to individuals and one relating to teams.

In the course of the above, the candidate must:

- comply with organisation's standards and values
- evaluate own behaviour and performance against organisational standards and values and adjust to achieve required standards
- ensure own behaviour and performance contributes to the integrity and credibility of the organisation
- facilitate processes to make decisions that are based on:
 - relevant information
 - examination of options and associated risks
 - input from relevant people
- communicate about making and implementing decisions including:
 - facilitating agreement on the preferred course of action and implementation plans
 - monitoring and seeking feedback on the implementation and impact of decisions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- methods to identify an organisation's standards and values when they are stated, and where they are implied
- organisational values and expectations of behaviour
- basic leadership theories
- common leadership styles

- organisation's process for raising questions about standards and values
- examples of behaviours and performance that would typically be considered damaging to an organisation
- concepts of:
 - organisational values and ethics
 - role modelling
 - integrity and credibility
 - leadership.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR412 Communicate effectively as a workplace leader

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to communicate effectively as a workplace leader, including understanding the context, choosing methods of communication to suit the audience, and following up.

The unit applies to managers, supervisors and team leaders required to communicate with other persons within the workplace. Communication skills cover a range of methods and contexts within principally structured environments.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for communication | 1.1 Identify purpose and audience for communication 1.2 Identify the desired outcome of the communication 1.3 Evaluate available methods of communication according to task requirements and organisational business policies and procedures 1.4 Identify potential barriers to effective communication and develop solutions to minimise impact |
| 2. Engage in communication | 2.1 Communicate using media and format relevant to the context 2.2 Use respectful and positive approaches to communications 2.3 Employ two-way processes to ensure receipt and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| | acknowledgement of message 2.4 Provide opportunities to clarify and confirm understanding |
| 3. Review communication | 3.1 Maintain record of the communication process and outcomes according to organisational policies and procedures 3.2 Identify follow up actions and communicate to relevant persons 3.3 Seek feedback on communication processes from all parties 3.4 Identify and incorporate opportunities to improve leadership communication processes |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Analyses and evaluates textual information from a range of sources to inform communication processes |
| Writing | <ul style="list-style-type: none"> Plans and prepares workplace documentation for relevant stakeholders according to organisational formats |
| Oral Communication | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges with a range of audiences using structure and language to suit the audience |
| Initiative and enterprise | <ul style="list-style-type: none"> Adheres to organisational policies and procedures relevant to own role |
| Teamwork | <ul style="list-style-type: none"> Cooperates, collaborates and consults with others to clarify and confirm understanding and seek feedback Selects and uses appropriate communication conventions and practices to build rapport, seek or present information |
| Planning and organising | <ul style="list-style-type: none"> Plans and implements activities and processes to identify and establish communication and record keeping requirements Uses analytical processes to identify potential problems and generate solutions Systematically gathers and analyses all relevant information and evaluates options in order to make decisions about communication processes |

Unit Mapping Information

Supersedes and is equivalent to BSBLDR401 Communicate effectively as a workplace leader.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR412 Communicate effectively as a workplace leader

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare, engage and review communication on at least four occasions with different individuals or groups.

In the course of the above, the candidate must:

- identify the context for communication and select approach and responses accordingly
- create and present messages by choosing method and mode appropriate to the audience and context
- undertake effective two-way communication from the perspective of a supervisor or team leader
- identify and record actions required as a result of communication and follow-up in a timely manner.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation requirement and organisational policies on workplace communication
- characteristics of effective leadership communication
- electronic and non-electronic communication methods, including situations where they would or would not be used
- effective listening techniques
- common feedback process and methods
- leadership communication responsibilities applicable to own role
- common barriers to effective communication in a workplace context
- characteristics of verbal and non-verbal communication.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources for communication and leadership.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR413 Lead effective workplace relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills, knowledge and outcomes required to use leadership to promote team cohesion. It includes motivating, mentoring, coaching and developing the team and forming the bridge between the management of the organisation and team members.

The unit applies to team leaders, supervisors and new or emerging managers where leadership plays a role in developing and maintaining effective workplace relationships. It applies in any industry or community context. At this level work will normally be carried out within routine and non-routine methods and procedures, which require planning, evaluation, leadership and guidance of others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to lead workplace relationships | 1.1 Identify work team objectives according to organisational strategy 1.2 Collect and analyse information for the achievement of work task 1.3 Share ideas and information with relevant internal and external stakeholders according to work task 1.4 Develop strategy for completion of work task in collaboration with work team |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|--|
| 2. Lead workplace relationships | 2.1 Identify and implement methods to facilitate collaboration to complete work task 2.2 Support colleagues experiencing difficulties fulfilling work requirements 2.3 Manage conflict constructively within the organisation's processes and parameters of own role 2.4 Communicate work progress to relevant internal and external stakeholders |
| 3. Review leadership | 3.1 Seek feedback on relationship management for work task from relevant stakeholders 3.2 Analyse feedback on relationship management 3.3 Evaluate personal performance in leading workplace relationships 3.4 Identify areas of improvement for leading workplace relationships future work tasks |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Collects, analyses and evaluates textual information from a range of resources to inform improvement strategies |
| Oral Communication | <ul style="list-style-type: none"> Selects or adjusts communication style to maintain effectiveness of interaction and build and maintain engagement consistent with organisational requirements |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies and follows legislative and organisational requirements relevant to own role |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders Adapts personal communication style to build trust and positive working relationships and to show respect for the opinions, values and particular needs of others Plays a lead role in situations requiring effective collaboration, demonstrating conflict resolution skills and ability to engage and motivate others |
| Planning and organising | <ul style="list-style-type: none"> Plans and implements activities and processes to manage and review work performance |

| | |
|--|---|
| | <ul style="list-style-type: none">• Systematically gathers and analyses all relevant information to formulate and evaluate possible solutions to difficulties |
|--|---|

Unit Mapping Information

Supersedes and is equivalent to BSBLDR402 Lead effective workplace relationships.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR413 Lead effective workplace relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead effective workplace relationships on at least four occasions with different individuals or groups.

In the course of the above, the candidate must:

- access and analyse information required to achieve planned outcomes
- collaborate with work team to develop and implement a work task strategy
- apply techniques for resolving problems and conflicts, and dealing with poor performance according to organisational and legislative requirements
- monitor and communicate work progress to relevant internal and external stakeholders
- seek and review feedback to improve workplace leadership.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- considerations for communicating information including audience cultural and social diversity
- consultation processes including internal and external sources of consultees
- impacts of relationships, cultural and social environment, in supporting or hindering the achievement of planned outcomes
- techniques for developing positive work relationships and building trust and confidence in a team, including:
 - interpersonal styles
 - communications
 - consultation
 - cultural and social sensitivity
 - networking

- impact of legislation and organisational policies on workplace relationships
- techniques for communicating information and ideas to a range of stakeholders
- common methods to resolve workplace conflict
- common methods to manage poor work performance
- common methods to monitor, analyse and improve work relationships.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to performance evidence
- workplace documentation and resources
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR414 Lead team effectiveness

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills, knowledge and outcomes required to lead the performance of a team and to develop team cohesion.

The unit applies team leaders, supervisors and new emerging managers who have an important leadership role in the development of efficient and effective work teams. Leaders at this level also provide leadership for the team and bridge the gap between the management of the organisation and the team members. As such they must 'manage up' as well as manage their team/s.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan team outcomes | 1.1 Lead team to identify and establish team objectives and work processes 1.2 Support team to document identified objectives and work processes according to organisational processes 1.3 Encourage team members to incorporate innovation and productivity measures in work plans 1.4 Lead and support team members to meet expected outcomes |
| 2. Promote team cohesion | 2.1 Provide opportunities for input of team members into planning, decision making and operational aspects of work team |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|--|
| | 2.2 Support team members to take responsibility for own work and to assist each other in undertaking required roles and responsibilities 2.3 Provide feedback to team members on their efforts and contributions 2.4 Address or refer issues, concerns and problems identified by team members 2.5 Model expected behaviours and approaches |
| 3. Supervise team performance | 3.1 Encourage team members to participate in and take responsibility for team activities and communication processes 3.2 Support team to identify and resolve problems which impede performance 3.3 Ensure own contribution to work team serves as a role model for others |
| 4. Liaise with management | 4.1 Establish open communication with line management 4.2 Communicate information from line management to the team 4.3 Communicate unresolved issues, concerns and problems raised by the team to line management to action 4.4 Communicate issues raised by management to the team to action |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Writing | <ul style="list-style-type: none"> Prepares workplace plans that communicate intent and elicits feedback clearly and effectively |
| Oral communication | <ul style="list-style-type: none"> Engages in discussions or provides information using structure and language appropriate to the audience and situation |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with team members Adapts personal communication style to model required behaviours, build trust and positive working relationships and to show respect for the opinions and values of others Plays a lead role in situations requiring effective collaboration, demonstrating conflict resolution skills and ability to engage and motivate others |

| | |
|-------------------------|---|
| Planning and organising | <ul style="list-style-type: none">• Develops, implements and monitors plans and processes to ensure team engagement and effectiveness• Uses formal analytical thinking techniques to identify issues and generate possible solutions, seeking input from others, as required |
|-------------------------|---|

Unit Mapping Information

Supersedes and is equivalent to BSBLDR403 Lead team effectiveness.

Supersedes but is not equivalent to BSBSMB407 Manage a small team.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR414 Lead team effectiveness

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop a team development plan, that addresses:
 - innovation and productivity measures
 - team cohesion
 - issues management and actions.

In the course of the above, the candidate must:

- apply knowledge of organisational goals, objectives and plans to work tasks
- communicate with team members and management to identify and establish team purpose, roles, responsibilities, goals plans and objectives and resolve problems
- consult, encourage, support and provide feedback to team members
- model team leadership behaviours and approaches.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- work processes, including team purpose, roles, responsibilities, goals and plans
- organisational escalation policies and procedures
- behaviours which enhance organisational image for work team, clients and customers
- processes for setting goals that contribute to team effectiveness
- effects of individual behaviour on team effectiveness
- innovation and productivity measures in work plans
- key features of common leadership styles.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- information about the organisation, including organisational structure, goals, objectives and plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR521 Lead the development of diverse workforces

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead the development of a diverse workforce. It covers supporting and engaging with a diverse workforce to maximise the benefit of diversity to the organisation.

The unit applies to supervisors, team leaders, new and emerging managers who lead within a diverse workforce environment and exercise discretion and autonomy within a structured business context.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish benefits of workforce diversity | 1.1 Identify benefits of diversity in business and workplace contexts 1.2 Qualify and quantify the source of workforce diversity 1.3 Identify legislation and organisational policies and procedures that relate to workplace diversity 1.4 Identify opportunities and barriers to inclusive engagement |
| 2. Embed diversity into team plans and operations | 2.1 Develop work plans to accommodate diversity 2.2 Confirm that work plans incorporate contributions from diverse workforce members 2.3 Adjust plans and operations to align with relevant diversity |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | legislation and organisational policies and procedures 2.4 Design processes to incorporate and maximise the benefits of diversity |
| 3. Support development of a diverse workforce | 3.1 Apply communication processes and behaviours according to diversity work plans and processes 3.2 Identify biases and assumptions in communication and behaviour of self and others and adjust, as required 3.3 Provide workplace support and access to diversity services |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Writing | <ul style="list-style-type: none"> Develops texts dealing with complex ideas and concepts using specialised and detailed language to convey explicit information |
| Self-management | <ul style="list-style-type: none"> Analyses the implications of legislation, policy and other organisational responsibilities in carrying out own role |
| Teamwork | <ul style="list-style-type: none"> Implements communication strategies and behaviours for a diverse range of colleagues to build rapport and foster strong relationships Identifies strengths and limitations of own interpersonal skills and attitudes and addresses areas that would benefit from further development |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for developing and implementing plans and processes to achieve organisational objectives, seeking feedback and advice, as required Uses analytical processes to identify workforce diversity issues and evaluate options to address them |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBLDR404 Lead a diverse workforce
- BSBLDR504 Implement diversity in the workplace
- BSBLDR804 Influence and shape diversity management.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR521 Lead the development of diverse workforces

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead the development of at least one diverse workforce.

In the course of the above, the candidate must:

- identify diversity within a team based workforce and outline opportunities and barriers to inclusive engagement of individuals
- promote the benefits of diversity within the workplace and identify the business benefits of incorporating diversity into planning and operations
- develop a work plan that integrates a diverse workforce, adjusting the plan and operations to meet legislation, regulations and policy
- structure continuous feedback and review processes into team activities.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, regulation and business policies and procedures relevant to diversity in the workplace
- types of diverse individuals and groups in the workplace
- strategies, tools and techniques for integrating and engaging a diverse workforce
- potential impacts of gender, race, age, disability, sexual orientation, form of work engagement and flexible work arrangements on workforce engagement
- benefits of having a diverse workforce and barriers to inclusive engagement.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations related to workforce diversity
- workplace policies and procedures related to working with diversity
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR522 Manage people performance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage the performance of staff that are direct reports.

The unit applies to individuals who manage people. It covers work allocation and the methods to review performance, reward excellence and provide feedback. The unit makes the link between performance management and performance development and reinforces both functions as a key requirement for effective managers.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Allocate work | 1.1 Consult relevant groups and individuals on work to be allocated and resources available 1.2 Develop work plans and allocate work according to organisational requirements and operational plans 1.3 Develop and confirm performance standards and key performance indicators with relevant staff prior 1.4 Conduct risk analysis according to organisational risk management plan and legal requirements |
| 2. Assess performance | 2.1 Review performance management and processes according to legislation, organisational objectives and policies |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------|--|
| | 2.2 Train participants in the performance management and review process 2.3 Conduct performance management according to organisational policies procedures and relevant timelines 2.4 Monitor and evaluate performance according to performance standards and key performance indicators |
| 3. Provide feedback | 3.1 Provide informal feedback and coaching to staff 3.2 Advise relevant personnel, where performance is poor and take necessary actions 3.3 Document feedback according to the organisational performance management system 3.4 Conduct formal structured feedback sessions as necessary and according to organisational policy |
| 4. Manage follow up | 4.1 Develop performance improvement and development plans according to organisational policies 4.2 Monitor underperforming individuals according to organisational policies 4.3 Respond to underperforming individuals, as required 4.4 Reinforce excellence in performance through recognition and continuous feedback |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|---|
| Learning | <ul style="list-style-type: none"> Consolidates and improves own knowledge and skills by coaching, mentoring or training others |
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses texts in organisational documents to facilitate performance management |
| Writing | <ul style="list-style-type: none"> Plans and prepares documents for allocating work and managing performance suitable for the target audience and in accordance with organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Uses language and structure appropriate to context and audience to explain expected standards of performance, provide feedback and coach staff |
| Self-management | <ul style="list-style-type: none"> Applies legal and regulatory responsibilities related to own work and the organisation as a whole |

| | |
|-------------------------|--|
| | <ul style="list-style-type: none">• Adheres to organisational policies and procedures |
| Teamwork | <ul style="list-style-type: none">• Applies the protocols governing what to communicate to whom and how in a range of work contexts• Collaborates with others to achieve joint outcomes, influencing direction and taking a leadership role on occasion |
| Planning and organising | <ul style="list-style-type: none">• Sequences and schedules complex activities, monitors implementation and manages relevant communication• Seeks advice, feedback and support, as required to assist in the decision-making process• Uses experiences to reflect on the ways in which variables impact on performance |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT502 Manage people performance.

Supersedes but is not equivalent to:

- BSBMGT404 Lead and facilitate off-site staff
- BSBSLS502 Lead and manage a sales team.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR522 Manage people performance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage performance of at least two individuals
- manage performance of at least one team.

In the course of the above, the candidate must:

- consult with stakeholders to identify work requirements, performance standards and agreed performance indicators
- develop work plans and allocate work to achieve outcomes efficiently and within organisational and legal requirements
- assess performance against performance indicators according to performance management and review processes
- monitor, evaluate and provide feedback on performance and provide coaching or training, as needed
- keep records and documentation in accordance with the organisational performance management system
- reinforce excellence in performance through recognition and continuous feedback
- respond to underperforming individuals according to organisational policies, as required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory and organisational requirements for performance management and review
- organisational risk management plan
- organisational human resource support services
- organisational performance measurement systems
- key features of unlawful dismissal rules and due process

- staff development options and information.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation on performance management
- workplace documentation and resources for performance management and review.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR523 Lead and manage effective workplace relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead and manage effective workplace relationships.

The unit applies to individuals in leadership or management positions who have a prominent role in establishing and managing processes and procedures to support workplace relationships. These individuals apply the values, goals and cultural diversity policies of the organisation. They use complex and diverse methods and procedures as well as a range of problem solving and decision making strategies, which require the exercise of considerable discretion and judgement.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish effective workplace relationship processes | 1.1 Identify required processes for workplace collaboration according to organisational policies and procedures 1.2 Develop consultation processes for employees to contribute to issues related to their work role 1.3 Develop processes for conflict management 1.4 Develop processes for escalated issues or refer to relevant personnel |
| 2. Manage effective | 2.1 Delegate and confirm responsibilities for fulfilling work tasks |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| workplace relationships | 2.2 Collaborate and support team to perform work tasks 2.3 Identify and address issues in workplace relationships according to processes established 2.4 Monitor and communicate to employees outcomes of conflict management |
| 3. Review management of workplace relationships | 3.1 Seek feedback on management of workplace relationships from relevant stakeholders 3.2 Evaluate feedback for improvements to leadership style 3.3 Identify areas of improvement for future workplace relations leadership |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Writing | <ul style="list-style-type: none"> Prepares plans and policies incorporating appropriate vocabulary, grammatical structure and conventions |
| Self-management | <ul style="list-style-type: none"> Adapts personal communication style to model behaviours, build trust and positive working relationships, and to support others Takes responsibility for formulating, organising and implementing plans, processes and strategies that impact the workplace |
| Initiative and enterprise | <ul style="list-style-type: none"> Follows organisational policies and procedures regarding diversity and ethical conduct |
| Teamwork | <ul style="list-style-type: none"> Plays a lead role in situations requiring effective collaboration, demonstrating high level support and facilitation skills and ability to engage and motivate others Evaluates outcomes to identify opportunities for improvement |
| Planning and organising | <ul style="list-style-type: none"> Systematically gathers and analyses all relevant information and evaluates options to inform decisions about organisational strategies |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBLDR502 Lead and manage effective workplace relationships.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR523 Lead and manage effective workplace relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement processes to manage ideas and information on at least two occasions, including:
 - communicating information to support others to achieve work responsibilities
 - facilitating employees' contributions to consultation on work issues
 - providing feedback on the outcomes of consultations
 - resolving issues raised or referring to relevant personnel
- develop and implement processes and systems to manage difficulties on at least two occasions, including:
 - identifying and resolving conflicts and other difficulties according to organisational policies and procedures
 - planning how to address difficulties
 - providing guidance, counselling and support to assist co-workers in resolving their work difficulties.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- systems, policies and procedures that can support the development of effective work relationships
- key aspects of work relationships, including:
 - interpersonal styles
 - communications
 - consultation
 - cultural and social sensitivity
 - networking

- conflict resolution
- legislation relevant to managing effective workplace relationships
- organisational policies and procedures relevant to workplace relationships
- methods to develop processes for:
 - consultation with employees
 - conflict management
 - task issue management.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to workplace relationships
- workplace documentation and resources for workplace relationships.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR601 Lead and manage organisational change

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead and manage organisational change.

The unit applies to managers with responsibilities that extend across the organisation or across significant parts of a large organisation. They may have a dedicated role in human resources management, workforce development, or work in a strategic policy or planning area.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop change management strategy | 1.1 Identify major operational change requirements according to organisational objectives, performance gaps, business opportunities or threats, and management decisions 1.2 Assess risks and opportunities presented by operational change requirements 1.3 Consult stakeholders, specialists and experts to confirm the change management opportunities and process |
| 2. Implement change management strategy | 2.1 Assign resources to the project and confirm reporting protocols with relevant stakeholders 2.2 Develop communication or education plan, in consultation with relevant personnel |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 2.3 Arrange and manage activities for delivery of communication or education plans |
| 3. Evaluate change management strategy | 3.1 Assess performance of communication or education plan against objectives 3.2 Identify and respond to barriers to the change according to risk management plans and organisational objectives 3.3 Modify communication or education plan according to change program objectives |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets detailed information that may deal with complex ideas related to issues both within and outside the workplace context |
| Writing | <ul style="list-style-type: none"> Uses clear and precise language to develop information about objectives, requirements, activities and recommendations Develops complex plans and strategies in appropriate format for the audience and purpose |
| Oral Communication | <ul style="list-style-type: none"> Discusses and seeks information using appropriate structure and language for the audience Uses questioning and active listening to clarify or confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets, analyses and presents numeric information in complex documents |
| Initiative and enterprise | <ul style="list-style-type: none"> Takes a lead role in the execution of organisational strategic goals and associated roles and responsibilities Develops new and innovative ideas through exploration and lateral thinking |
| Teamwork | <ul style="list-style-type: none"> Uses a variety of communication tools and strategies to build and maintain effective working relationships Uses inclusive and collaborative techniques to seek feedback, negotiate and consult with a range of stakeholders |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises and implements activities required to achieve strategic priorities and outcomes, including consulting with others and sequencing events to minimise uncertainty for staff Uses problem-solving skills to identify and analyse issues or barriers, and develop responses |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBINN601 Lead and manage organisational change
- BSBLDR805 Lead and influence change
- BSBMGT615 Contribute to organisation development.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR601 Lead and manage organisational change

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement a change management plan to lead and manage organisational change.

In the course of the above, the candidate must:

- analyse and interpret information about the organisation's internal and external environment and consult with stakeholders to identify requirements and opportunities for changes that support organisational objectives
- prioritise opportunities for changes with input from relevant stakeholders
- develop a change management project plan for the priority changes incorporating resource requirements, risk management and timelines
- develop strategies to communicate or educate the changes and embed them
- obtain approvals and agree reporting protocols with relevant managers and implement the plan including addressing barriers to change
- review and evaluate the change management project plan and modify as needed to achieve objectives.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- events or trends that may impact on the achievement of organisational objectives
- existing policies and practices to guide organisational change
- methods for conducting cost-benefit analysis for high priority change requirements and opportunities
- methods for conducting risk analysis, including barriers to change and relevant mitigation strategies
- content of communication and education plans, including:

- promotion of benefits of organisational change
- change management processes or cycles and strategies for communicating and embedding change
- organisational behaviour and how the external environment can impact on change strategies
- components of a change management project plan.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to organisational change management.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR602 Provide leadership across the organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to demonstrate senior leadership behaviour and personal and professional competence. Business ethics are also addressed in this unit.

The unit applies to individuals who have a role in modelling professionalism in their organisation and industry and inspiring and motivating others to achieve organisational goals. Leadership is seen in the context of the organisational mission.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Communicate organisational mission and goals | 1.1 Confirm objectives, values and standards according to organisation's strategic direction 1.2 Establish links between organisational objectives, values and standards and the responsibilities of relevant groups and individuals 1.3 Confirm that media and language used for communicating organisational mission and goals meets the needs of individuals and group 1.4 State expectations of internal groups and individuals 1.5 Investigate incidents and communicate results to relevant |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | groups and individuals according to organisational policies and procedures |
| 2. Influence groups and individuals | 2.1 Make decisions according to organisational policies and procedures and work task timeframes 2.2 Facilitate improvements to organisational and workplace policies and procedures 2.3 Facilitate integration of global environment and new technology into work activities 2.4 Represent organisation in the media and community |
| 3. Build and support teams | 3.1 Assign accountabilities and responsibilities to teams according to competencies and operational plans 3.2 Resource teams to allow them to achieve their objectives 3.3 Create and maintain a positive work environment 3.4 Encourage teams and individuals to develop innovative approaches to work tasks |
| 4. Demonstrate personal and professional competence | 4.1 Model ethical conduct in own work and encourage others to adopt business ethics 4.2 Adapt interpersonal and leadership styles to meet circumstances and situations 4.3 Set and aim to achieve personal objectives and work program outcomes 4.4 Engage in professional development activities and industry and professional networks and groups |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-----------------|--|
| Learning | <ul style="list-style-type: none"> Seeks ways to maintain and improve own skills and knowledge Identifies systems, devices and applications with potential to meet current and/or future needs |
| Reading | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types |
| Writing | <ul style="list-style-type: none"> Researches, plans and prepares documentation using format and language appropriate to the audience |
| Self-management | <ul style="list-style-type: none"> Works autonomously making high level decisions related to the achievement of organisational goals |

| | |
|-------------------------|--|
| | <ul style="list-style-type: none">• Identifies designation of roles and responsibilities and their contribution to broader organisational goals• Identifies implications of ethical and other organisational responsibilities in carrying out own role |
| Teamwork | <ul style="list-style-type: none">• Identifies strengths and limitations of own interpersonal skills and addresses areas that would benefit from further development• Collaborates and cooperates with others, playing an active role in leading and facilitating effective group interaction and influencing direction• Facilitates a work environment in which others feel comfortable to identify, explore and build on a variety of perspectives in order to achieve shared outcomes |
| Planning and organising | <ul style="list-style-type: none">• Accepts responsibility for planning and sequencing complex tasks and workload of self and others, negotiating key aspects with others taking into account capabilities, efficiencies and effectiveness |
| Problem solving | <ul style="list-style-type: none">• Applies problem solving processes to identify risks, evaluate options and determine solutions |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT605 Provide leadership across the organisation.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR602 Provide leadership across the organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- influence, support and provide resources for at least two individuals
- influence, support and provide resources for at least one team.

In the course of the above, the candidate must:

- communicate the organisation's objectives, values and standards to a range of stakeholders using appropriate media and language
- assign accountabilities to teams according to competencies and operational plans
- resource teams according to work objectives
- demonstrate ethical conduct and professional competence and continuing professional development
- encourage others to adopt business ethics and build their commitment to the organisation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational and workplace policies and procedures related to providing leadership in the organisation
- business ethics and its application to leadership styles and the organisation's mission, objectives and values
- organisational research and implementation methods
- processes to establish and maintain a positive work environment for individuals and teams
- organisational mission, purpose and values
- organisational objectives, plans and strategies and regulatory requirements
- organisational change processes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulation, standards and codes
- workplace documentation and resources required to make leadership decisions.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR811 Lead strategic transformation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to analyse and lead organisational transformation and learning for strategic outcomes. It covers leading transformational practices, cultivating collaborative practices, completing ongoing professional development and providing strategic leadership in a dynamic context.

The unit applies to those who use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, in order to generate ideas and provide solutions to complex problems. They use communication skills to demonstrate their understanding of theoretical concepts and to transfer knowledge and ideas to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to undertake strategic change | 1.1 Identify personal responsibilities in strategic transformation process according to task objectives 1.2 Develop strategic change strategy in collaboration with relevant stakeholders 1.3 Brief internal and external stakeholders of strategic change processes and intended outcomes 1.4 Establish communication channels for organisational personnel to contact management |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|--|
| 2. Lead strategic change | 2.1 Analyse and confirm capacity and competence of relevant individuals to contribute to change processes and plans 2.2 Identify and resolve risks in change management process 2.3 Develop learning and communication processes for addressing problems and risks arising during organisational change 2.4 Make changes to change management process according to risks and inform stakeholders of updates |
| 3. Review strategic outcomes | 3.1 Analyse impacts of leadership on change management process using self-reflection 3.2 Seek feedback on leadership during change management process from staff 3.3 Apply feedback to leadership style |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Learning | <ul style="list-style-type: none"> Develops insights from experience to improve personal performance |
| Reading | <ul style="list-style-type: none"> Sources, evaluates and critiques ideas and information from a range of complex texts to assist with decisions, choices and to manage organisational requirements |
| Writing | <ul style="list-style-type: none"> Researches and prepares plans for relevant stakeholders incorporating appropriate vocabulary, grammatical structure and conventions |
| Oral communication | <ul style="list-style-type: none"> Expresses opinions and information and responds to other people's views using language appropriate to audience |
| Teamwork | <ul style="list-style-type: none"> Identifies impact of own behaviour on others, reflecting on personal strengths and limitations and implementing strategies to regulate behaviour Adapts personal communication style to build a positive working relationship and show respect for the opinions, values and particular needs of others |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage complex activities with strategic implications that involve a range of personnel with diverse skills, knowledge and experience Systematically gathers and analyses relevant information and evaluates options to inform decisions with the potential to affect organisational outcomes |

Unit Mapping Information

No equivalent unit. Supersedes and is not equivalent to BSBLDR801 Lead personal and strategic transformation.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR811 Lead strategic transformation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead a strategic business transformation for an organisation or large work area on at least one occasion.

In the course of the above, the candidate must:

- prepare to provide strategic leadership during a business change process
- review strategic outcomes and incorporate feedback into leadership style.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- content of and process for developing a change management strategy
- key stakeholders involved in strategic change
- organisational mission, purpose and values
- strategic change risks and mitigation strategies including learning and communication processes
- range of leadership styles
- personal development planning methodologies
- organisational transformation and the management of the stages of change.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations and codes of practice relevant to business strategic change

- workplace plans, mission statements, policies and procedures for strategic change.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR812 Develop and cultivate collaborative partnerships and relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish collaborative partnerships and relationships with business and industry stakeholders. This unit covers communicating to influence others, cultivating new and existing partnerships, establishing positive collaborative relationships, leading the establishment of a partnership program and establishing reporting mechanisms.

The unit applies to people who use cognitive and creative skills to review, critically analyse and synthesise knowledge, in order to generate ideas and provide solutions to complex problems. They use communication skills to demonstrate their understanding of theoretical concepts and to transfer knowledge and ideas to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine partnership outcomes | 1.1 Identify new partnerships and assess any existing partnerships according to task objectives 1.2 Select partners according to strategic objectives 1.3 Establish communication strategy in collaboration with partners 1.4 Establish key indicators and feedback processes for evaluating the health of the business partnerships |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 1.5 Identify and implement strategies for staff and stakeholder commitment and contribution |
| 2. Establish partnership through activity | 2.1 Identify legal framework and processes for partnership activity in collaboration with partners 2.2 Plan and allocate resource requirements to accomplish activity with partners 2.3 Establish processes to resolve conflict in a fair, equitable and collaborative manner between partners 2.4 Implement reporting systems for reporting results against planned partnership activity outcomes |
| 3. Cultivate partnership performance | 3.1 Analyse reporting system results of partner activity against intended outcomes 3.2 Identify improvements to partnership in collaboration with partners 3.3 Implement identified improvements to partnership operations |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Sources, evaluates and critiques ideas and information from a range of complex texts |
| Writing | <ul style="list-style-type: none"> Develops texts dealing with complex concepts using specialised and detailed language to convey strategy context and intent and requirements in accordance organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Leads discussions using language and non-verbal features to suit the audience Uses active listening and questioning to seek the views and opinions of others |
| Numeracy | <ul style="list-style-type: none"> Selects and uses familiar mathematical techniques to determine costs and benefits associated with strategic resource decisions |
| Self-management | <ul style="list-style-type: none"> Takes a lead role in the development of organisational goals, roles and responsibilities Leads adherence to organisational policies, procedures and legal requirements and considers own role in terms of its contribution to broader goals of the organisation |
| Teamwork | <ul style="list-style-type: none"> Plays a lead role in building effective collaboration and trust, demonstrating high level conflict resolution skills and ability to engage |

| | |
|-------------------------|--|
| | <ul style="list-style-type: none">and motivate othersIdentifies and uses a variety of appropriate conventions and protocols when communicating with colleagues and external stakeholders |
| Planning and organising | <ul style="list-style-type: none">Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demandsMonitors agreed outcomes and required indicators |

Unit Mapping Information

No equivalent unit. Supersedes and is not equivalent to BSBLDR803 Develop and cultivate collaborative partnerships and relationships.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR812 Develop and cultivate collaborative partnerships and relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and cultivate a collaborative partnership, including:
 - establishing partnership requirements in collaboration with partners according to regulatory, employment and organisational requirements
 - planning partnership activity and reporting systems to review results of partnership activity
 - developing collaborative approaches to enhance individual, team and organisational outcomes
 - analysing results of partnership activity and implementing improvements to partnership.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory requirements applicable to task
- risk management principles related to task requirements
- organisational and partner organisation's mission, purpose, values, objectives and strategies
- techniques that cultivate collaborative relationships and partnerships
- common data collection methods relevant to performance evidence
- communication techniques to foster partnership, conduct stakeholder consultations
- emotional intelligence and its relationship to individual and team effectiveness
- organisational transformation and the management of the stages of change.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation, regulations, standards and codes relevant to establishing partnerships
- workplace documents including business strategic plans, policies and procedures for partnership processes and activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLDR813 Lead and influence ethical practice

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to apply ethical leadership and take responsibility for influencing ethical practice. It addresses establishing ethical standards, applying ethical practice into the organisation's culture and processes and promoting ethical leadership and decision making at all levels of the organisation.

The unit applies to people who use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, in order to generate ideas and provide solutions to complex problems. They use communication skills to demonstrate their understanding of theoretical concepts and to transfer knowledge and ideas to others.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Leadership

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish ethical standards | 1.1 Identify importance of ethics and standards for organisation 1.2 Identify strengths, weaknesses and threats to ethical conduct in the organisation 1.3 Develop solutions to mitigate identified threats to ethical conduct according to organisational and industry practice 1.4 Communicate reporting procedures to staff for suspected unethical conduct according to organisational policy |
| 2. Apply ethics in | 2.1 Analyse complex ethical matters according to relevant |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|--|
| organisation | <p>legislation, industry codes of practice and organisational standards</p> <p>2.2 Resolve complex ethical matters within scope of responsibility</p> <p>2.3 Develop and implement frameworks for ethical decision-making and policy setting</p> |
| 3. Promote ethics in organisation | <p>3.1 Identify opportunities to promote ethical industry practices for organisation</p> <p>3.2 Influence the development and review of policies and procedures to include and address ethical considerations</p> <p>3.3 Create opportunity to promote dialogue on organisational values and ethics with and between staff</p> <p>3.4 Establish a strategy for continuous improvement in ethical conduct for staff</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Sources, evaluates and critiques ideas and information from a range of complex texts |
| Writing | <ul style="list-style-type: none"> Develops texts dealing with complex concepts using specialised and detailed language to convey context and intent |
| Self-management | <ul style="list-style-type: none"> Takes a lead role in the development of organisational goals, roles and responsibilities Leads planning and review processes in accordance with organisational policies and procedures, legal and ethical requirements |
| Teamwork | <ul style="list-style-type: none"> Plays a lead role in situations requiring effective collaborative skills, demonstrating high-level influencing skills, focusing and shaping awareness, and engaging and motivating others |
| Planning and organising | <ul style="list-style-type: none"> Accepts responsibility for planning and sequencing complex tasks and workload Monitors progress of plans in achieving agreed outcomes Systematically gathers and analyses relevant information and evaluates options to inform decisions about complex organisational strategies |

Unit Mapping Information

Supersedes and is equivalent to BSBLDR806 Lead and influence ethical practice.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLDR813 Lead and influence ethical practice

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement at least two ethical decision making frameworks to establish, apply and promote ethics in an organisation.

In the course of the above, the candidate must:

- research, develop and implement policies and procedures for managing ethical practices in an organisation
- promote ethical leadership and decision making including providing leadership and creating an opportunity to promote dialogue on ethics with and between staff
- establish a strategy for continuous improvement in organisational ethics.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- industry, state, national and international trends in ethical conduct
- frameworks for ethical decision making/problem solving and policy setting
- organisational ethics, values and standards
- role of organisational codes of ethics/conduct
- key features of procedural fairness
- procedures, strategies or protocols that can be used to identify and address unethical conduct
- legislative and regulatory context of the organisation, as it relates to ethical work practices.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations and workplace standards relevant to ethical practice
- workplace documents, including organisational strategic plans and relevant organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG311 Work in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to work in a legal services environment including accessing legal information, drafting documents with assistance and seeking feedback on work performance.

The unit applies to those who support administrative legal work under supervision.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to work | 1.1 Identify task requirements 1.2 Identify scope of own responsibility in relation to task 1.3 Access information from client file or legislation or precedents according to task requirements |
| 2. Undertake work according to task requirements | 2.1 Communicate with clients using legal terminology 2.2 Assist in drafting documents according to task requirements 2.3 Organise despatch of documents 2.4 Document activities and actions according to organisational policies and procedures |
| 3. Review work | 3.1 Self-check document for improvement according to |

| | |
|--|--|
| | legislative, ethical and organisational requirements 3.2 Seek feedback from supervisor on document and court conduct 3.3 Implement feedback into work behaviour or process |
|--|--|

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Learning | <ul style="list-style-type: none"> Identifies gaps in knowledge and experience to assist with clarifying and extending understanding |
| Numeracy | <ul style="list-style-type: none"> Calculates and records time allocated to tasks and applicable fees |
| Oral communication | <ul style="list-style-type: none"> Uses questioning to clarify understanding Uses industry-specific vocabulary to address key personnel |
| Reading | <ul style="list-style-type: none"> Interprets textual information to identify correct terms or processes Proofreads text to ensure accuracy of content and format |
| Writing | <ul style="list-style-type: none"> Uses specific, accurate and relevant language to complete workplace documentation |
| Teamwork | <ul style="list-style-type: none"> Follows accepted practices and protocols when communicating with internal and external parties |
| Initiative and enterprise | <ul style="list-style-type: none"> Adheres to organisational and legal requirements |
| Planning and organising | <ul style="list-style-type: none"> Plans and implements tasks to achieve outcomes according to organisational requirements |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBLEG301 Apply knowledge of the legal system to complete tasks
- BSBLEG305 Use legal terminology in order to carry out tasks
- BSBLEG306 Maintain records for time and disbursements in a legal practice.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG311 Work in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- work in a legal services environment, including:
 - accessing legal information
 - drafting documents, with assistance
 - seeking feedback on performance.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- types of legal documents
- spelling, abbreviations and appropriate use of legal terminology
- roles and responsibilities of key bodies in the legal system
- scope of support role to provide legal advice, complete legal work and appear in court according to relevant jurisdiction
- legislative, ethical and organisational requirements related to legal documents and court behaviour
- legislative and ethical standards related to entering a court or tribunal
- organisational policies and procedures of presenting documents
- key personnel within a legal practice and their responsibilities.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures relevant to staff responsibilities

- information on courts, their jurisdiction and behavioural expectations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG312 Carry out search of the public record

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to complete a search of the public record. This involves planning and conducting the search and obtaining, storing and reporting the information according to instructions. Searches may be carried out using digital databases.

The unit applies to individuals who must access public records in a work environment, with assistance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan search | 1.1 Identify information required from search process 1.2 Identify information sources and procedure for obtaining information 1.3 Plan work according to specified timelines |
| 2. Undertake search | 2.1 Access and complete search request form 2.2 Identify costs associated with the search 2.3 Lodge search request form 2.4 Obtain record of lodgement and store according to organisational policies and procedures |
| 3. Finalise search | 3.1 Obtain search results and check that information needs have |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| | been met 3.2 Store required documents according to organisational policies and procedures 3.3 File records of expense according to organisational policies and procedures 3.4 Advise required personnel of search outcome and report outstanding issues and matters that cannot be resolved within scope of own role |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none">Plans and organises a routine job, identifying possible risks and accessing relevant resources |
| Reading | <ul style="list-style-type: none">Identifies and interprets textual information to determine job requirementsChecks information for accuracy |
| Writing | <ul style="list-style-type: none">Completes a range of forms accurately and legibly using correct technical vocabulary |
| Oral Communication | <ul style="list-style-type: none">Listens to clear, sequenced instructions of several steps, and asks clarifying questions as required |
| Numeracy | <ul style="list-style-type: none">Calculates and records details of search fees and time estimates |
| Technology | <ul style="list-style-type: none">Uses organisational file sharing and storage systems |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG302 Carry out search of the public record.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG312 Carry out search of the public record

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- carry out a search of the public record at least three times.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures relating to carrying out searches of public records
- codes of conduct including those relating to:
 - privacy and confidentiality
 - use of company property
 - duty of care
 - ethical behaviour
 - conflict of interest
- compliance requirements related to research and access to public records
- legal terminology in relation to the relevant area of law and the appropriate legal process
- location and appropriate search procedures of relevant search sources, including online information locations
- standard problems and resolutions in the sourcing and delivery of information
- roles and responsibilities of internal and relevant external individuals and authorities.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment and resources required to complete search processes described in the performance evidence
- legislation and regulations relevant to public record searches.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG313 Lodge documents in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to organise documents for lodgement at a court or non-judicial registry, plan and carry out lodgement, and return proof of document lodgement. Document lodgement may be carried out digitally.

The unit applies to individuals who provide administrative support in a legal services environment, while under supervision.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan document lodgement | 1.1 Identify task requirements, including registry for lodgement and documents to be lodged 1.2 Identify requirements for chosen method of lodgement 1.3 Copy and collate documents, where relevant, according to registry requirements and organisational policies and procedures 1.4 Obtain monies to pay for lodgement, where relevant, according to organisational policies and procedures |
| 2. Carry out document lodgement | 2.1 Access registry safely and securely 2.2 Submit documents according to registry and task requirements 2.3 Record relevant details where documents are deficient and |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|--|
| | cannot be lodged 2.4 Make payment, where relevant, according to registry requirements 2.5 Resolve barriers to lodgement within scope of own role or refer to relevant personnel |
| 3. Finalise document lodgement | 3.1 Obtain record of lodgement and confirm that task requirements have been met 3.2 Store required documents according to organisational policies and procedures 3.3 File records of lodgement expense according to organisational policies and procedures 3.4 Advise required personnel of lodgement outcome and report outstanding issues |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none">Plans and organises routine jobs, identifying possible risks and accessing relevant resources |
| Reading | <ul style="list-style-type: none">Identifies and interprets textual information to determine job requirementsChecks information for accuracy |
| Writing | <ul style="list-style-type: none">Completes a range of forms accurately and legibly using correct technical vocabulary |
| Oral Communication | <ul style="list-style-type: none">Listens to clear, sequenced instructions of several steps, and asks clarifying questions as required |
| Numeracy | <ul style="list-style-type: none">Calculates and records details of lodgement fees and time estimates |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG303 Deliver court documentation.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG313 Lodge documents in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- assemble complete and accurate documentation for lodgement relating to:
 - at least two different courts
 - at least one non-judicial registry.

In the course of the above, the candidate must:

- plan submission schedule to accommodate agreed timelines
- prepare monies for filing fees
- maintain records of activities, actions, outcomes, time and costs according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures for document submission, including policies and procedures relating to:
 - disbursements
 - document storage
- accepted codes of conduct including those relating to:
 - privacy and confidentiality
 - ethical behaviour
 - compliance with reasonable direction
- relevant court processes, current legislation, legal processes and required documentation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- appropriate legislation and regulations relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG314 Protect information in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to protect information in a legal services environment.

The unit applies to individuals who provide services to support legal practitioners, while under supervision.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Work within accepted codes of conduct | 1.1 Update documents and forward reports on the progress of matters to clients and legal practitioner according to instructions and organisational policies and procedures 1.2 Identify personal role and responsibilities in relation to communication with relevant parties 1.3 Communicate conflict of interest or potential conflict of interest in a legal matter to the legal practitioner responsible for the matter 1.4 Follow organisational procedures for receipting payments 1.5 Assess information regarding what is and what is not disclosable |
| 2. Follow storage | 2.1 Store and secure documents according to organisational |

| ELEMENT | PERFORMANCE CRITERIA |
|------------|---|
| procedures | policies and procedures 2.2 Label and store all materials required by legislation to be stored for certain periods of time and according to organisational policies and procedures |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Identifies and interprets textual information to determine and to adhere to organisational practices |
| Writing | <ul style="list-style-type: none">Legibly and correctly completes and updates documentation |
| Oral Communication | <ul style="list-style-type: none">Participates in spoken exchanges using structure and language to suit the audienceUses active listening and questioning techniques to confirm understanding |
| Initiative and enterprise | <ul style="list-style-type: none">Complies with legislative obligations and follows ethical requirements, policies and procedures relevant to own role |
| Planning and organising | <ul style="list-style-type: none">Plans, organises and implements tasks to achieve outcomes according to organisational requirementsAddresses problems by implementing standard procedures, referring problems outside own scope of responsibility to others |
| Technology | <ul style="list-style-type: none">Uses digital systems and tools to access and store information, understanding the need for security of all data |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBLEG304 Apply the principles of confidentiality and security within the legal environment.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG314 Protect information in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least three occasions, handle, store and secure electronic, paper based, exhibits and confidential information according to organisational policies and procedures.

In the course of the above, the candidate must:

- apply relevant legislation and codes of conduct and ensure all work is performed with honesty and integrity
- update documents according to instruction and organisational policy or procedures
- identify and apply standard resolutions to breaches of confidentiality, security and conduct by self and others within the firm
- seek advice from appropriate sources where the level of confidentiality required in a situation is unclear.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- personal role and responsibilities in relation to contact with the opposing party, including confidentiality requirements
- responsibilities relating to receipting payments
- scenarios in which client-related matters are discussed
- storage processes
- organisational policies and procedures
- accepted codes of conduct including those relating to:
 - privacy and confidentiality
 - use of company property
 - duty of care
 - ethical behaviour

- non-discriminatory practice
- conflict of interest
- compliance with reasonable direction
- relevant court processes, current legislation, legal processes and required documentation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment and resources for confidentiality and security processes
- legislation and regulations relevant to common legal matters
- background information on courts, their jurisdiction and behavioural requirements.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG315 Assist in planning activities in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist others by supporting the planning of activities in a legal services environment.

The unit applies to individuals who work under supervision to arrange appointments and other activities based on court dates and required legislative timeframes. In this role, individuals apply a broad range of administrative competencies in a legal office work environment, using some discretion and judgement. They provide support to legal practitioners and may provide technical advice and support to a team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Record file-related critical dates and times | 1.1 Identify file-related deadlines 1.2 Record file-related deadlines according to organisational policies and procedures |
| 2. Make and record appointments on behalf of designated personnel | 2.1 Establish and clarify priorities of designated personnel 2.2 Agree and document timelines for achievement of priorities 2.3 Arrange appointments for all parties involved 2.4 Reschedule appointments as required |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 3. Assist designated personnel to prepare for critical dates | <ul style="list-style-type: none">3.1 Check records daily for upcoming appointments and commitments3.2 Remind designated personnel of critical file dates3.3 Prepare and distribute information meeting task requirements to designated personnel prior to critical dates3.4 Set reminders to schedule appointments in consultation with designated personnel |
| 4. Follow up outcomes of meetings and other activities | <ul style="list-style-type: none">4.1 Organise appropriate follow-up actions and activities in conjunction with designated personnel and relevant parties4.2 Update file notes according to organisational policies and procedures |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none">• Identifies and interprets textual data to identify and plan job deadlines to adhere to requirements |
| Writing | <ul style="list-style-type: none">• Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation |
| Oral Communication | <ul style="list-style-type: none">• Articulates clearly using specific terminology and relevant tone to convey requirements• Uses active listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none">• Uses basic mathematical formula to calculate and monitor work timeframes |
| Initiative and enterprise | <ul style="list-style-type: none">• Takes personal responsibility for adherence to legal and regulatory requirements• Identifies and responds to organisational policies and procedures |
| Teamwork | <ul style="list-style-type: none">• Selects appropriate mode of communication for a specific purpose relevant to own role• Cooperates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability |
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficient and effective outcomes• Takes responsibility for outcomes of routine decisions related directly to own role |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG308 Assist in prioritising and planning activities in legal practice.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG315 Assist in planning activities in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- assist with planning activities for at least two different matters.

In the course of the above, the candidate must:

- apply organisation skills and procedures to diarise all relevant details of appointments and file deadlines and follow up as required
- apply standard procedures to solve problems including double-bookings or non-attendances
- create and maintain up-to-date, legible, accurate and accessible records of all activities and outcomes according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures for organising appointments
- key features of organisational administrative systems and files
- codes of conduct relevant to planning activities in a legal services environment.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment and resources for scheduling activities
- legislation and regulations relevant to planning activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG421 Apply understanding of the Australian legal system

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to apply understanding of the Australian legal system. This includes understanding and applying knowledge of the Federal system, sources of law, and the trial system for resolving disputes.

The unit applies to individuals who are in legal assistant job roles, as well as those who are required to apply basic legal knowledge in a work environment.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Research sources of law | 1.1 Identify sources of Australian law 1.2 Identify hierarchy of sources of law 1.3 Access sources of legislation according to organisational policies and procedures 1.4 Apply principles for reading and interpreting legislation |
| 2. Identify and revise inconsistencies between laws | 2.1 Resolve conflicts between pieces of statute law according to hierarchy of sources of law 2.2 Resolve conflicts between pieces of common law according to hierarchy of courts 2.3 Resolve conflicts between statute and common law according to |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|---|
| | hierarchy of sources of law |
| 3. Research the trial system | 3.1 Examine elements of the adversary trial system 3.2 Identify and examine differences in law and procedures between civil and criminal proceedings |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Writing | <ul style="list-style-type: none">Records results of investigations using clear and comprehensible language and grammar to convey detailed information and capture different perspectives |
| Initiative and enterprise | <ul style="list-style-type: none">Applies knowledge of legislation, regulations, jurisdictions and procedures relevant to role accurately and comprehensively |
| Planning and organising | <ul style="list-style-type: none">Uses systematic, analytical processes in non-routine situations, gathering relevant information and identifying and evaluating options |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG413 Identify and apply the legal framework.

Supersedes but is not equivalent to BSBINT407 Prepare business advice on export Free-on-Board Value.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG421 Apply understanding of the Australian legal system

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare one report or one presentation that covers the following:
 - Australian law
 - statute law
 - common law
 - elements of the adversary trial system
 - civil and criminal proceedings.

In the course of the above, the candidate must:

- explain differences between Australian law-making institutions, including courts and legislative bodies
- explain relationship between legislative powers of Federal Government and state/territory governments, including limitations on legislative authority
- identify appropriate bodies to hear civil versus criminal proceedings
- explain how adversarial system of trial operates
- explain application and outcomes of principles of precedent.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- institutions and main features of the Australian legal system
- federal system
- sources of law
- trial systems for resolving disputes
- rules for resolving conflicts of laws
- legal terminology in relation to areas of practice of law and relevant legal processes

- methods used to identify and interpret appropriate information about sources of Australian law
- scope of own responsibilities in context of legal framework.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment and resources for fulfilling performance criteria
- relevant legislation and regulations.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG422 Maintain a file in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to maintain a file under the instruction of a designated individual.

The unit applies to individuals who apply well established, sound theoretical knowledge in the provision of administrative support in a legal services environment.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Initiate preliminary file activities | 1.1 Obtain details of the legal matter from the client according to instructions and organisational policies and procedures 1.2 Develop a quote in line with organisation's fee structure and forward it to instructing legal practitioner for approval, where applicable 1.3 Identify terms of engagement with instructing legal practitioner and confirm expectations are agreed upon and documented 1.4 Complete and record results of conflicts of interest check 1.5 Prepare initial file documentation |
| 2. Open file | 2.1 Locate, access and extract relevant information for initiating files according to organisational policies and procedures 2.2 Select and brief support staff to assist on file, in consultation |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>with designated individual</p> <p>2.3 Forward confirmation of instructions, details of those working on the file, a summary of work to be performed and associated timelines to client on behalf of instructing legal practitioner</p> <p>2.4 Plan work in conjunction with designated individual and allocate resources</p> |
| 3. Contact other persons about the file | <p>3.1 Communicate with relevant parties and document outcomes</p> <p>3.2 Update file notes detailing activities, actions and outcomes and record time</p> |
| 4. Undertake legal process according to plan | <p>4.1 Maintain information flow to relevant parties on progress of matter</p> <p>4.2 Immediately refer issues or problems outside own range of responsibility to designated individual for resolution</p> <p>4.3 Confirm enough money is left in the trust account and contact instructing legal practitioner to facilitate the transfer of additional funds, where applicable</p> <p>4.4 Support development of a progress report</p> |
| 5. Facilitate file administration and closure | <p>5.1 Reconcile final costing and prepare invoice, where applicable</p> <p>5.2 Arrange meeting with relevant personnel to review final relevant documentation in order to facilitate sign-off before forwarding to client</p> <p>5.3 Update and complete file notes</p> <p>5.4 Confirm final accounting and resolve outstanding disbursements</p> <p>5.5 Close and archive file according to policies and procedures of the firm</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Reviews text from both hard copy and online sources to identify correct procedures and processes, to maintain information flow and to obtain specific information relevant to the current client and/or file |
| Writing | <ul style="list-style-type: none"> Uses correct terminology, grammatical structures, spelling and organisational style guides to prepare documentation Uses clear and detailed language and paraphrasing techniques to |

| | |
|---------------------------|---|
| | accurately transcribe events |
| Oral Communication | <ul style="list-style-type: none">• Uses effective questioning and listening techniques to clarify needs and to obtain information from others• Relates information obtained, progress made and requirements using clear and concise language appropriate to the audience and environment |
| Numeracy | <ul style="list-style-type: none">• Extracts and evaluates numerical information and using a calculator or relevant software applies basic arithmetic functions, fractions and percentages to calculate billable hours, prepare invoices, monitor trust accounts and finalise disbursements |
| Initiative and enterprise | <ul style="list-style-type: none">• Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements |
| Teamwork | <ul style="list-style-type: none">• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning and organising own workload, determining when to allocate work to team members• Makes routine decisions and implements standard procedures for routine tasks, using formal decision-making processes for more complex and non-routine situations |
| Technology | <ul style="list-style-type: none">• Uses familiar digital technologies and systems to access information, enter and store data, present information and communicate with others |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG414 Establish and maintain a file in legal services.

Supersedes but is not equivalent to BSBLEG403 Maintain trust accounts.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG422 Maintain a file in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- maintain at least four files in a legal services environment.

In the course of the above, the candidate must:

- document and file information according to organisational policies, procedures and legal requirements, and within agreed timeframes
- apply financial systems and procedures of the organisation according to legal requirements and within agreed timeframes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope of role and responsibilities, and obligation to refer matters to supervisor
- organisational policies and procedures relating to the following:
 - quotation and invoicing
 - privacy and confidentiality
 - use of company property
 - duty of care
- legal terminology applicable to performance evidence including that specific to area of law
- archiving procedures and appropriate file retention periods
- relevant legal processes and required documentation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace reference materials to fulfil the performance criteria
- legislation and regulations relevant to fulfil the performance criteria.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG423 Conduct simple legal research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to work under supervision to conduct simple legal research locating relevant information and writing up a basic summary.

The unit applies to individuals who provide legal support services while under supervision. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Process request for information | 1.1 Document request using appropriate recording system 1.2 Confirm client identity and other party's right to receive information 1.3 Clarify client needs and establish relevant criteria in consultation with designated person to ensure client needs are met 1.4 Select response methods according to task requirements 1.5 Forward request for information to others where appropriate |
| 2. Carry out legal research | 2.1 Identify relevant sources and locations of information according to organisational and task requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------|--|
| | 2.2 Access identified sources and escalate where problems arise 2.3 Extract information relevant to request for information 2.4 Store extracted information according to security and confidentiality procedures of the organisation |
| 3. Finalise research | 3.1 Evaluate extracted information for relevance according to task requirements 3.2 Maintain integrity of information 3.3 Develop a summary of research findings to relevant parties for review and action |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies information from a range of texts to determine the procedures and strategies needed to perform a range of tasks Identifies, accesses, analyses and evaluates information from a range of sources Proofreads documents for accuracy of content, layout, grammar, spelling and punctuation |
| Writing | <ul style="list-style-type: none"> Gathers, evaluates and integrates information from a range of sources to develop plans Presents finished document in required format using language, structure and style appropriate to audience Creates required records according to organisational recording procedures and systems |
| Oral Communication | <ul style="list-style-type: none"> Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies and follows legislative requirements and organisational policies and procedures associated with own role |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises and implements tasks to meet organisational requirements Identifies and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital technologies and tools to complete work tasks |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBRES404 Research legal information using primary sources.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG423 Conduct simple legal research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- conduct simple legal research in relation to at least three different requests for information.

In the course of the above, the candidate must:

- follow organisational procedures for receiving, documenting and processing requests for information
- process and format information in accordance with organisational policies and procedures, particularly with regard to security and confidentiality.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures relating to locating information and conducting research under supervision
- relevant information sources including:
 - process for accessing the information source
 - barriers to access for information sources
 - the type of information
- legislative requirements that apply when researching, accessing and using legal information.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- appropriate legislation and regulations relevant to common legal matters
- organisational policies and procedures for formatting of documents, security and confidentiality
- office equipment and resources for conducting simple legal research.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG424 Support the drafting of complex legal documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to support the drafting of complex legal documents that meet legislative and organisational requirements, including by using advanced features of relevant software packages.

The unit applies to individuals who use a broad knowledge base and well-developed skills to provide administrative support in a legal environment.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish drafting requirements | 1.1 Identify task requirements 1.2 Select software according to task requirements 1.3 Establish document design and structure 1.4 Design and structure document to meet legislative and task requirements 1.5 Review and update existing precedent documents |
| 2. Prepare to draft | 2.1 Develop and use precedents to ensure consistency of design and layout 2.2 Evaluate and amend templates to ensure document requirements can be met |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------|--|
| | 2.3 Recommend improvements to relevant personnel for design and structure of existing documents 2.4 Facilitate a review process of suggested improvements, where necessary |
| 3. Develop draft | 3.1 Prepare documents using appropriate and available precedent documents according to policies and procedures of the organisation 3.2 Enter and edit relevant data 3.3 Use a range of advanced software functions to ensure accurate completion of task 3.4 Check documents for spelling, grammar, numeric data and layout 3.5 Proofread documents for accuracy of content and consistency of layout and style 3.6 Make modifications to meet required specifications 3.7 Manage any difficulties and produce documents within agreed timelines |
| 4. Finalise draft | 4.1 Submit documents as required 4.2 Arrange review of documents with designated person 4.3 Undertake final publishing of documents 4.4 Save and store document according to organisational procedures |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Investigates and interprets a variety of texts to determine and adhere to requirements Applies accurate and systematic reviewing techniques to scrutinise precedent documents, templates and new documentation |
| Oral Communication | <ul style="list-style-type: none"> Uses active questioning and listening techniques, when interacting with colleagues and ascertaining task requirements Uses appropriate language and features to effectively convey opinions and recommendations |
| Initiative and enterprise | <ul style="list-style-type: none"> Monitors adherence to organisational policies and procedures |

| | |
|-------------------------|---|
| | and legislative requirements |
| Teamwork | <ul style="list-style-type: none">• Cooperates with others as part of familiar routine activities, and contributes to specific activities requiring joint responsibility and accountability |
| Planning and organising | <ul style="list-style-type: none">• Uses planning and organisational skills to perform tasks within designated timelines• Uses analytical thinking techniques to identify issues and generate possible solutions, seeking input from others as require |
| Technology | <ul style="list-style-type: none">• Uses digital applications to access, extract, organise, integrate and share relevant information• Considers purpose, needs and limitations when selecting devices, applications and features for different tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG418 Produce complex legal documents.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG424 Support the drafting of complex legal documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support the drafting of at least three complex legal documents using advanced functions of at least one software package, or integrate functions of at least two different software packages.

In the course of the above, the candidate must:

- design and produce accurate documents that conform to specified standards within agreed timelines.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures in relation to precedent design and use
- relevant legislation, rules, regulations, and codes of practice for drafting legal documents
- process for developing and testing templates.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry. This includes access to:

- software required to support document drafting process
- organisational policies and procedures for drafting documents
- legislation and regulations for drafting legal documents to fulfil the performance criteria.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG425 Apply principles of legal project management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to apply project management skills in a legal context to assist in the delivery of project to time and cost requirements.

The unit applies to those who have a broad knowledge of project management who contribute well-developed skills to creating solutions to unpredictable problems. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan project | 1.1 Identify project scope according to client instructions 1.2 Identify project resources 1.3 Identify project risk and mitigation measures 1.4 Confirm deliverable with management according to organisational policy 1.5 Develop project plan according to client and organisational requirements |
| 2. Execute project | 2.1 Support in developing deliverable according to client and organisational requirements 2.2 Assist in monitoring project progress against project |

| | |
|---------------------|---|
| | objectives 2.3 Contribute to rectifying contingencies according to organisational policies and task requirements |
| 3. Maintain project | 3.1 Seek feedback from relevant stakeholders on project management processes to inform lessons learned 3.2 Analyse and amend processes according to feedback 3.3 Record and action feedback as required according to organisational policy and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Learning | <ul style="list-style-type: none"> Evaluates effectiveness of plans and results to inform improvement decisions |
| Reading | <ul style="list-style-type: none"> Extracts and analyses relevant information from texts of varying complexity |
| Writing | <ul style="list-style-type: none"> Develops a range of documents using structure and vocabulary appropriate to audience, context and purpose |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction |
| Initiative and enterprise | <ul style="list-style-type: none"> Adheres to legislative and organisational requirements |
| Planning and organising | <ul style="list-style-type: none"> Determines job sequence and works logically and systematically to undertake defined tasks |
| Technology | <ul style="list-style-type: none"> Uses familiar digital technologies and systems to access information, prepare information and support projects |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG425 Apply principles of legal project management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply project management principles to at least three legal projects.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation and regulations relevant to legal project management
- techniques to identify and document client expectations
- legal project risks and mitigation techniques
- organisational policies and procedures for legal project management
- monitoring processes to track project delivery
- methods to obtain feedback for identifying lessons learned from relevant personnel.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation and regulations relevant to legal project management
- organisational policies and procedures for legal project management
- relevant software for legal project management.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG521 Conduct and apply legal research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to undertake and apply legal research under supervision. This includes identifying research requirements and sources of information, applying information to a set of facts, evaluating the quality of the information, and preparing and producing reports.

The unit applies to individuals who apply a well-established, sound theoretical knowledge base and use a range of specialised, technical or managerial competencies to plan and carry out work in a legal context in accordance with legislation, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to research | 1.1 Confirm task requirements 1.2 Prepare research plan and prioritise activities according to task requirements 1.3 Identify available resources and technical requirements 1.4 Delegate tasks according to timelines and task requirements |
| 2. Undertake research | 2.1 Identify sources of legal data and information 2.2 Research and identify key information to be extracted |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------|--|
| 3. Review research | 3.1 Check information for compliance with copyright and legal requirements 3.2 Analyse legal data and information for relevance to facts 3.3 Edit and collate legal data and information according to task, legal and ethical requirements |
| 4. Apply research | 4.1 Draft document in appropriate format according to task and organisational requirements 4.2 Present legal data and information according to organisational policies and procedures and legal requirements 4.3 Evaluate draft against previously identified criteria and address identified gaps or deficits 4.4 Review document in consultation with supervisor 4.5 Make amendments where necessary |
| 5. Prepare final draft | 5.1 Prepare executive summary 5.2 Check final draft and present it to supervisor for review and sign-off 5.3 Facilitate distribution of report as required |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none">Identifies and analyses complex texts to assess relevance to research taskCompares prepared drafts against criteria to evaluate whether it meets requirements |
| Writing | <ul style="list-style-type: none">Composes and edits texts, selecting appropriate vocabulary, structure and format for audience and purpose |
| Oral Communication | <ul style="list-style-type: none">Explains issues and requirements clearly and obtains information from others by listening and questioning |
| Numeracy | <ul style="list-style-type: none">Analyses task requirements to calculate the duration of activities |
| Initiative and enterprise | <ul style="list-style-type: none">Adheres to legal and regulatory responsibilities related to own work |
| Teamwork | <ul style="list-style-type: none">Collaborates with others to achieve required outcomesSelects and uses appropriate communication practices and |

| | |
|-------------------------|--|
| | conventions for the purpose and audience |
| Planning and organising | <ul style="list-style-type: none">Plans, prioritises, organises and implements tasks to meet organisational requirements, liaising with others when requiredSystematically analyses information against set criteria in order to decide on amendments needed to draft reports |
| Technology | <ul style="list-style-type: none">Uses the main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBRES502 Research legal information using secondary sources.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG521 Conduct and apply legal research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- conduct and apply legal research in relation to four different matters.

In the course of the above, the candidate must:

- consult with relevant stakeholders to prepare a research plan
- conduct research using both primary and secondary sources, according to legal and organisational requirements
- produce a final report using appropriate format and language, according to the requirements of the request and within agreed timelines.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- common primary and secondary sources of legal data and information
- situations where there would be an obligation to refer matters to supervisors and/or obtain sign-off on legal work
- policies and procedures of the organisation relating to researching, accessing and using legal information
- legislative requirements that apply when researching, accessing and using legal information
- format for presenting written reports.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG522 Apply legal principles in contract law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to analyse and evaluate information from a variety of sources and supply solutions to contractual issues in a legal environment.

The unit applies to individuals who provide support in a range of legal service settings with a degree of responsibility to plan and complete investigations. It also applies to individuals in a range of work environments that are required to apply a basic understanding of contract law principles.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish nature and meaning of contract | 1.1 Confirm task requirements 1.2 Identify type of contract 1.3 Research key elements of contract 1.4 Assess the validity of contract |
| 2. Apply principles of contract law | 2.1 Analyse legal matter involving contractual issues using principles of contract law 2.2 Evaluate key issues arising from contractual issue 2.3 Assess applicable remedies |
| 3. Finalise application of | 3.1 Review analysis with supervisor as required |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------|---|
| contract law | 3.2 Identify and flag unresolved contractual issues 3.3 Document analysis according to organisational requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Identifies, analyses and evaluates complex text to clarify contractual definitions, principles and legal requirements |
| Writing | <ul style="list-style-type: none">Prepares specific information based on results of research, analysis and evaluation conveying an understanding of outcomes and alternatives, and using terminology appropriate to relevant personnel |
| Oral Communication | <ul style="list-style-type: none">Articulates key issues, identified remedies and organisational procedures using detailed language and suitable tone appropriate to audience and environmentElicits views and opinions of others by active listening and questioning |
| Initiative and enterprise | <ul style="list-style-type: none">Identifies own legal rights and responsibilities and is extending understanding of general legal principles applicable across work contextsAdheres to organisational policies and proceduresIdentifies nature and purpose of own role and associated responsibilities and how it contributes to work of others in immediate work context |
| Planning and organising | <ul style="list-style-type: none">Plans and implements tasks required to achieve organisational requirementsMakes a range of critical and non-critical decisions in relatively complex situations, taking a range of information into accountUses formal analytical thinking techniques to identify issues and generate possible solutions, seeking input from others as required |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG415 Apply the principles of contract law.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG522 Apply legal principles in contract law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply principles of contract law in relation to at least six different matters.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- commonly used legal terminology, institutions and main features of Australian legal system
- methods used to identify appropriate information sources of Australian law
- nature, aims and rationale of contracts, including agreements, intention to create legal relations, consideration, and capacity to contract
- procedures for discharge of contracts including for a workplace legal matter
- remedies for breach of contract
- illegal and void contracts
- privacy of contract and assignment of contract.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to contract law
- sources of information about contract law.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG523 Apply legal principles in tort law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assess, analyse, and evaluate tort law matters, and apply the principles of the law of torts.

The unit applies to individuals who provide support in a range of legal service settings with a degree of responsibility to plan and complete investigations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply principles of tort law | 1.1 Identify task requirements 1.2 Identify key tort law elements for analysis according to task requirements 1.3 Identify key provisions of legislation and common law, policies or procedures according to task requirements |
| 2. Apply principles of tort law | 2.1 Analyse legal matter for possible torts 2.2 Evaluate identified torts according to task requirements 2.3 Extract and document information relevant to task |
| 3. Finalise application of tort law | 3.1 Identify and document damages applicable for identified torts 3.2 Submit findings to designated person according to organisational policies and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| | 3.3 Analyse and amend findings with supervisor according to task requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Identifies, reviews and interprets complex legal text from a range of sources and determines how content may be applied in application of torts law |
| Writing | <ul style="list-style-type: none">Documents research findings, analyses and evaluations using format, language and structure suitable to audience and environment |
| Oral Communication | <ul style="list-style-type: none">Uses questioning and listening techniques to elicit informationPresents factual information and recommendations using specific and relevant language and features |
| Initiative and enterprise | <ul style="list-style-type: none">Takes personal responsibility for following organisational policies and procedures |
| Teamwork | <ul style="list-style-type: none">Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Planning and organising | <ul style="list-style-type: none">Plans, organises and implements tasks required to achieve organisational outcomesMakes a range of critical and non-critical decisions in relatively complex situations, analysing a range of factors to inform decision-makingUses formal analytical thinking techniques to identify issues and generate possible solutions |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG416 Apply the principles of the law of torts.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG523 Apply legal principles in tort law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply legal principles in tort law matters on at least three occasions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- commonly used legal terminology, institutions and main features of Australian legal system
- distinctions between tort and crime, breach of contract, and other legal obligations
- methods used to identify appropriate information about sources of Australian law
- torts relating to:
 - negligence
 - negligent misrepresentation
 - person, goods and land
- meaning of:
 - occupier's liability
 - vicarious liability
- law of defamation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to tort law

- sources of information on tort law.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG524 Apply principles of evidence law in matters under litigation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to analyse and evaluate key issues associated with evidence law for matters under litigation.

The unit applies to individuals who provide support in a range of legal service settings with a degree of responsibility to plan and complete investigations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply evidence law | 1.1 Access sources of legal information on nature and meaning of evidence law 1.2 Distinguish between case law and legislation related to evidence 1.3 Assess significance of evidence law in various contexts in a legal environment |
| 2. Employ principles of evidence law | 2.1 Apply principles of evidence to relevant legal matters arising in the workplace 2.2 Analyse and evaluate key issues 2.3 Review analysis with designated person |
| 3. Finalise application of | 3.1 Distinguish relevant and admissible evidence in context of a |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------|---|
| principles of evidence law | legal matter 3.2 Identify consequence of evidence not being relevant and/or admissible |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none">Identifies, reviews and interprets complex legal text from a range of sources and determines how content may be applied in the application of evidence law |
| Writing | <ul style="list-style-type: none">Prepares documentation that incorporates an evaluation of information using specialised and cohesive language in a format and style appropriate to a specific audience |
| Oral Communication | <ul style="list-style-type: none">Uses questioning and listening techniques to elicit informationPresents results and findings clearly and concisely using appropriate language, terminology and tone |
| Enterprise and initiative | <ul style="list-style-type: none">Identifies implications of legal responsibilities related to own work and recognises specific legal principles applicable in evidence law |
| Planning and organising | <ul style="list-style-type: none">Plans and organises data collection tasksUses systematic analytical process to access, investigate and compare information about legal matters |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG417 Apply the principles of evidence law.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG524 Apply principles of evidence law in matters under litigation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply principles of evidence law in relation to at least four different matters.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- commonly used legal terminology, institutions and main features of Australian legal system
- methods used to identify appropriate information about sources of Australian law
- nature and meaning of evidence law, including:
 - standard and burden of proof
 - relevance of evidence
 - hearsay evidence
 - competence and compellability of witnesses
 - opinion evidence
 - evidence of character.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations about evidence law
- sources of information on evidence law.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG525 Apply legal principles in intellectual property law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to apply legal principles in intellectual property law matters. It covers maintaining control over the copyright owner's work, commercialising copyright material, preventing the unauthorised use of an original work and using other party's original work legitimately.

The unit applies to individuals who provide support in a range of legal service settings with a degree of responsibility to plan and complete investigations.

It also applies to people who may be authors, creators or other owners of works covered by copyright, as well as employees who have a role in ensuring that their organisational copyright is protected and/or that their organisation uses others' copyright appropriately to benefit the organisation without infringing the rights of copyright owners.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply principles of intellectual property | 1.1 Identify task requirements 1.2 Identify key principles of intellectual property law according to task requirements 1.3 Identify key provisions of legislation and common law, policies or procedures relevant to task requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| 2. Employ principles of intellectual property | 2.1 Apply principles of intellectual property law to relevant legal matters arising in the workplace 2.2 Analyse and evaluate key issues 2.3 Develop recommendations of legal and economic implications of copyright infringement according to task requirements |
| 3. Finalise application of intellectual property principles | 3.1 Review analysis with designated person 3.2 Obtain feedback from relevant personnel 3.3 Amend advice according to feedback 3.4 Store documents and data used according to organisational policies and procedures |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Researches and analyses complex texts, including legislation, to identify relevant informationMonitors and reviews organisational policies and procedures to ensure compliance with legislative requirements |
| Writing | <ul style="list-style-type: none">Records and maintains copyright documentation according to legislative and organisational requirementsReviews and updates organisational policies and procedures to ensure compliance with legislative requirements |
| Oral Communication | <ul style="list-style-type: none">Provides advice using language and terminology appropriate to audienceObtains information from others by listening and questioning |
| Initiative and enterprise | <ul style="list-style-type: none">Implements, monitors and reviews policies and procedures to ensure organisational compliance with legislative requirements |
| Self-management | <ul style="list-style-type: none">Follows accepted communication practices when seeking or providing advice about intellectual propertyIdentifies and complies with legislative requirements associated with own role |
| Planning and organising | <ul style="list-style-type: none">Plans, organises and implements tasks needed to ensure compliance with legislative and organisational requirementsSystematically gathers and analyses information to decide on action needed to prevent or address copyright infringements |

| | |
|------------|---|
| Technology | <ul style="list-style-type: none">• Uses digital technologies or tools to access and record information |
|------------|---|

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBIPR301 Comply with organisational requirements for protection and use of intellectual property
- BSBIPR401 Use and respect copyright
- BSBIPR402 Protect and use new inventions and innovations
- BSBIPR403 Protect and use brands and business identity
- BSBIPR404 Protect and use innovative designs
- BSBIPR601 Develop and implement strategies for intellectual property management.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG525 Apply legal principles in intellectual property law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply principles of intellectual property law in at least four different matters.

In the course of the above, the candidate must:

- review and interpret information to determine how copyright applies in the organisation
- recommend actions to address risks and infringements
- communicate advice or recommendations about copyright to relevant stakeholders.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative framework for copyright and its application to the organisation including:
 - copyright owner of original works within or used by the organisation
 - policies and procedures for use of own copyright materials by other parties
 - policies and procedures for legitimate use of others' copyright materials
- sources of information and advice on copyright
- the types of works that attract copyright
- circumstances where a copyright notice is required
- regulations on selling copyright rights including:
 - commercialisation potential of copyright material
 - potential benefits for the firm
- intellectual property agreement documentation requirements
- further actions where intellectual property rights are breached
- methods to limit or deter unauthorised use of copyright material
- direct and indirect infringement of copyright
- when authorisation for use of copyright material is needed and how to obtain it

- different types of licences and how they apply to the firm.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation, regulations, standards and codes relevant to intellectual property.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG526 Apply legal principles in criminal law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to carry out administrative tasks within criminal law frameworks.

The unit applies to individuals who use well-developed skills and a broad knowledge base to provide support in a range of legal service settings. They apply solutions to a range of unpredictable problems and analyse and evaluate information from a variety of sources.

Its application in the workplace is determined by the job role of the individual and legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply principles of criminal law | 1.1 Identify task requirements 1.2 Identify key criminal law elements for analysis according to task requirements 1.3 Identify key provisions of legislation and common law, policies or procedures according to task requirements |
| 2. Apply elements of criminal law | 2.1 Analyse legal matter relevant to criminal law 2.2 Evaluate information according to task requirements 2.3 Prepare deliverable according to task and organisational |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------|--|
| | requirements |
| 3. Finalise deliverable | 3.1 Review deliverable with supervisor 3.2 Amend and sign-off according to organisational policies and procedures 3.3 Despatch document according to organisational requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information |
| Writing | <ul style="list-style-type: none">Uses clear, accurate and relevant language to organise, liaise, record and update information and complete workplace documentation according to organisational protocols |
| Oral Communication | <ul style="list-style-type: none">Provides clear explanations using language and features appropriate to the audienceEmploys listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none">Interprets numerical information and makes mathematical calculations to determine legal services costs |
| Self-management | <ul style="list-style-type: none">Takes full responsibility for following policies, procedures and legislative requirementsSelects the appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Planning and organisation | <ul style="list-style-type: none">Plans, prioritises and completes complex tasks according to legal and organisational requirements |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG511 Apply legal principles in criminal law matters.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG526 Apply legal principles in criminal law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply criminal law principles in at least four different matters.

In the course of the above, the candidate must:

- prepare to apply principles of criminal law according to task requirements
- apply elements of criminal law to prepare a deliverable
- review and amend deliverable according to feedback from supervisor
- despatch deliverable according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope of job role in the context of legislation, regulations and codes of practice
- relevant court processes
- key principles of criminal law
- types of criminal matters, defences, hearings, criminal jurisdictions
- types of courts and their interrelationship
- process for receiving and relaying calls regarding client charge and bail status
- document preparation process for letters and documents
- content and formatting requirements of selected deliverable
- key provisions of criminal law legislation
- documentation required in criminal law matters
- organisational required policies and procedures for criminal law matters.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace policies and procedures and reference materials relevant to performance evidence
- background information on courts, their jurisdiction and behavioural requirements
- appropriate legislation and regulations relevant to fulfil performance criteria.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG527 Apply legal principles in family law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to apply legal principles within the family law framework.

The unit applies to individuals who use well-developed skills and a broad knowledge base to provide support in a range of legal service settings. They apply solutions to a range of unpredictable problems and analyse and evaluate information from a variety of sources.

Its application in the workplace is determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply principles of family law | 1.1 Identify task requirements 1.2 Identify key family law elements for analysis according to task requirements 1.3 Identify key provisions of legislation and common law, policies or procedures according to task requirements |
| 2. Apply principles of family law | 2.1 Analyse legal matter relevant to family law according to task requirements 2.2 Evaluate information according to task requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------|---|
| | 2.3 Prepare deliverable according to task and organisational requirements 2.4 Complete and present documentation for review |
| 3. Finalise deliverable | 3.1 Review deliverable with relevant organisational personnel 3.2 Amend and sign-off according to organisational policies and procedures 3.3 Despatch document according to organisational requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information |
| Writing | <ul style="list-style-type: none"> Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation |
| Oral Communication | <ul style="list-style-type: none"> Clearly articulates requirements and explains legal procedures using language and features appropriate to the audience Employs active listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical information and makes mathematical calculations to determine maintenance obligations |
| Initiative and enterprise | <ul style="list-style-type: none"> Monitors adherence to organisational policies and procedures Keeps up-to-date with relevant legislation or regulations in relation to own responsibilities and considers the implications of these when planning and undertaking work |
| Planning and organising | <ul style="list-style-type: none"> Plans, sequences and completes tasks to achieve required outcomes, coordinating aspects with others, when required Analyses information to make decisions in relatively complex situations, taking a range of factors into account |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG510 Apply legal principles in family law matters.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG527 Apply legal principles in family law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply legal principles in at least four different family law matters.

In the course of the above, the candidate must:

- collect accurate and detailed facts from clients about property, support and parenting and interpret and communicate outcomes according to law
- provide appropriate information and documentation to clients at appropriate stages of legal process
- calculate and document relevant costing according to organisational requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- relevant court processes for family law matters
- legal processes required in this role
- family law matters including:
 - marriage dissolution
 - property settlement dealing with minors
- family law as it applies to scope of workplace responsibilities
- documentation required in family law matters
- required organisational policies and procedures pertinent to this role.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- appropriate legislation and regulations relevant to family law and common legal matters
- background information on courts, their jurisdiction and behavioural requirements
- workplace resources to fulfil performance criteria.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG528 Apply legal principles in property law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to apply legal principles in real property law matters.

The unit applies to individuals who use well-developed skills and a broad knowledge base to provide support in a range of legal service settings. They apply solutions to a range of unpredictable problems and analyse and evaluate information from a variety of sources.

Its application in the workplace is determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply principles of real property law | 1.1 Identify task requirements 1.2 Identify parties and key property law elements for analysis according to task requirements 1.3 Identify steps involved in buying and selling a property according to task requirements 1.4 Identify key provisions of legislation and common law, policies or procedures according to task requirements |
| 2. Apply principles of | 2.1 Obtain relevant documents from authorities and service |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|--|
| real property law | providers with supervision 2.2 Draft lease with supervision according to task requirements 2.3 Determine types of costs in accordance with legislative and regulatory requirements for costing legal services |
| 3. Facilitate file administration | 3.1 Verify and review documentation with supervisor 3.2 Register and lodge relevant documents with land titles office or other relevant government agencies according to organisational policies and procedures with supervision 3.3 File documentation according to organisational policies and procedures 3.4 Address post-settlement procedures with supervision |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Checks documents for accuracy and consistency of information |
| Writing | <ul style="list-style-type: none"> Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation according to organisational protocols |
| Oral Communication | <ul style="list-style-type: none"> Provides instructions or information using relevant language suitable to diverse audiences Confirms understanding listening and questioning techniques |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical information to determine costs and makes calculations to record duties and transact monies |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for following policies, procedures and legislative requirements Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Planning and organising | <ul style="list-style-type: none"> Plans, sequences and implements tasks within timelines and according to required procedures |
| Technology | <ul style="list-style-type: none"> Uses familiar digital technologies and systems to access and present information |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG512 Apply legal principles in property law matters.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG528 Apply legal principles in property law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply property law principles in at least four different matters.

In the course of the above, the candidate must:

- prepare, give and obtain appropriate and accurate information and documents from the parties at the required stages of the legal process
- conduct duties according to legislative and organisational requirements
- apply the principles of property law in the buying and selling of property and preparation and execution of leases
- prepare documentation and carry out the administrative activities associated with buying and selling property and preparing leasing contracts.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope of job role in context of legislation, regulations and codes of practice
- court processes for property transfer and disputes
- mortgages including:
 - legal implications
 - processes for obtaining and discharging
 - rights of mortgagees
- difference between real and personal property including distinctions in their method of transfer
- titles of ownership and their legal implications
- documentation processes associated with property law matters, including costing
- processes to obtain relevant documents from authorities and service providers
- content and process for drafting a lease including duties of lessor and lessee

- key principles of current property law
- key elements of legal processes required in this role
- documentation required in property law
- organisational policies and procedures pertinent to this role.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- appropriate legislation and regulations relevant to property law and common legal matters
- relevant workplace policies and procedures and reference materials
- background information on courts, their jurisdiction and behavioural requirements.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG529 Apply legal principles in corporation law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish business structures and prepare associated documentation within corporation law frameworks.

The unit applies to individuals who work under supervision and evaluate information from a variety of sources to complete and despatch required information.

Its application in the workplace is determined by the job role of the individual and legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply principles of corporation law | 1.1 Identify task requirements 1.2 Identify key corporation law elements for analysis according to task requirements 1.3 Identify key provisions of legislation and common law, policies or procedures according to task requirements |
| 2. Apply principles of corporation law | 2.1 Analyse legal matters relevant to corporation law according to task requirements 2.2 Evaluate information according to task requirements 2.3 Prepare deliverable according to task and organisational |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | requirements |
| 3. Finalise application of corporation law | <p>3.1 Verify and review documentation with relevant organisational personnel</p> <p>3.2 Amend and sign-off according to organisational policies and procedures</p> <p>3.3 Store or despatch document according to task and organisational requirements</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key informationChecks documents for accuracy and clarity of meaning |
| Writing | <ul style="list-style-type: none">Uses clear, accurate and relevant language to record information and to complete workplace documentation |
| Oral Communication | <ul style="list-style-type: none">Participates effectively in spoken interactions using appropriate language and features for each audience and situationUses active listening and questioning techniques to confirm and clarify understanding |
| Initiative and enterprise | <ul style="list-style-type: none">Identifies implications of law to organisational policies and proceduresKeeps up-to-date with relevant legislation or regulations and considers these when planning and undertaking work |
| Teamwork | <ul style="list-style-type: none">Selects appropriate form, channel and mode of communication for a specific purpose relevant to own roleAssists others as part of familiar workplace activities |
| Planning and organising | <ul style="list-style-type: none">Plans, organises and implements work activities that comply with legislative and organisational requirements, including timelinesEvaluates information to decide on relevance to firm |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBINT302 Apply knowledge of legislation relevant to international trade to complete work
- BSBLEG513 Apply legal principles in corporation law matters.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG529 Apply legal principles in corporation law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply corporations law principles in at least four matters.

In the course of the above, the candidate must:

- identify corporation law elements and key provisions of legislation, policies or procedures according to task requirements
- analyse and evaluate corporations law information to prepare a deliverable according to task and organisational requirements
- review and amend documentation with relevant organisational personnel
- store or despatch documentation according to task and organisational requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope of job role in the context of relevant legislation, regulations and codes of practice
- corporations law forms or documents for lodgement with appropriate government department
- structure, contents and purposes of an organisational Memorandum of Association (MOA) and Articles of Association
- documentation required in corporation law matters
- organisational policies and procedures
- different types of business structures including their structure, personnel, legal obligations, establishment procedures and purpose
- structure, contents and purposes of an organisational MOA and articles of association
- differences between proprietary companies and public companies including legal obligations, criteria and purpose of each

- types of costs for legal services relevant to corporations law according to legislative and regulatory requirements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry. This includes access to:

- appropriate legislation and regulations relevant to corporation law and common legal matters
- workplace policies and procedures and reference materials relevant to performance evidence
- background information on courts, their jurisdiction and behavioural requirements.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG530 Apply legal principles in wills and probate matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prepare wills and probates, powers of attorney and other deceased estate documentation.

The unit applies to individuals who work under supervision, use legal principles and evaluate information from a variety of sources to provide support in a range of legal service settings.

Its application in the workplace is determined by the job role of the individual and legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply principles in wills and probate matters | 1.1 Identify task requirements 1.2 Identify key wills and probate elements for analysis according to task and organisational requirements 1.3 Identify key provisions of legislation and common law, policies or procedures according to task requirements |
| 2. Apply principles in wills and probate matters | 2.1 Analyse legal matter relevant to corporation law according to task requirements 2.2 Evaluate information according to task requirements 2.3 Prepare deliverable according to task and organisational |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | requirements |
| 3. Finalise application of principles in wills and probate matters | <p>3.1 Verify and review documentation with relevant organisational personnel</p> <p>3.2 Amend and sign-off according to organisational policies and procedures</p> <p>3.3 Store or despatch document according to task and organisational requirements</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information |
| Writing | <ul style="list-style-type: none">Uses clear, accurate and relevant language to organise and record information and complete documentation |
| Oral Communication | <ul style="list-style-type: none">Participates effectively in spoken interactions using appropriate language and features for each audience and situationUses active listening and questioning techniques to confirm and clarify understanding |
| Initiative and enterprise | <ul style="list-style-type: none">Adheres to organisational policies and proceduresKeeps up-to-date with relevant legislation, regulations and policies and considers implications of these when planning and undertaking work |
| Teamwork | <ul style="list-style-type: none">Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Planning and organising | <ul style="list-style-type: none">Plans, sequences and implements tasks according to legislative and organisational requirements and specific instructionsEvaluates information to decide on relevance to situation |

Unit Mapping Information

Supersedes and is equivalent to BSBLEG515 Apply legal principles in wills and probate matters.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG530 Apply legal principles in wills and probate matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply legal principles in wills and probate matters on at least four occasions.

In the course of the above, the candidate must:

- prepare to apply wills and probate principles according to task requirements
- apply elements of wills and probate principles to prepare a deliverable
- review and amend deliverable according to feedback from supervisor
- despatch deliverable according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope of the job role in the context of legislation, regulations and codes of practice
- summarise the policies and procedures of the organisation for wills and probate matters
- contents and process to prepare documents required for task
- sources of instructions including testamentary, solicitor and deceased estate
- roles and responsibilities of parties involved in wills and probate matters
- forms, documents and annexures relevant to wills and probate.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- appropriate legislation and regulations relevant to wills and probate matters

- workplace policies and procedures and reference materials relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG531 Apply legal principles in administrative law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to support administrative law matters.

The unit applies to individuals who work under supervision, use legal principles and evaluate information from a variety of sources to provide support in a range of legal service settings including community legal centres.

Its application in the workplace is determined by the job role of the individual and legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to apply principles of administrative law | 1.1 Identify task requirements 1.2 Identify key administrative law elements for analysis according to task and organisational requirements 1.3 Identify key provisions of legislation and common law, policies and procedures according to task requirements |
| 2. Apply principles of administrative law | 2.1 Analyse legal matters relevant to administrative law according to task requirements 2.2 Evaluate information according to task requirements 2.3 Prepare deliverable according to task and organisational |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | requirements |
| 3. Finalise application of administrative law principles | 3.1 Verify and review documentation with supervisor 3.2 Amend and receive sign off according to organisational policies and procedures 3.3 Store or despatch document according to task and organisational requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Uses straightforward mathematical calculations to determine costs |
| Oral communication | <ul style="list-style-type: none"> Participate effectively in spoken interactions using appropriate language and features for each audience and situation Uses active listening and questioning techniques to confirm and clarifying understanding |
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information |
| Writing | <ul style="list-style-type: none"> Uses clear, accurate and relevant language to organise and record information and documentation |
| Teamwork | <ul style="list-style-type: none"> Selects appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Initiative and enterprise | <ul style="list-style-type: none"> Complies with organisational policies and procedures Keeps up-to-date with relevant legislation, regulations and policies and considers implications of these when planning and undertaking work |
| Planning and organising | <ul style="list-style-type: none"> Plans, sequences and implements tasks according to legislative and organisational requirements and specific instructions Evaluates information to decide on relevance to situation |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG531 Apply legal principles in administrative law matters

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply legal principles in administrative law matters on at least four occasions.

In the course of the above, the candidate must:

- prepare to apply principles of administrative law according to task requirements
- administrative apply elements of administrative law to prepare a deliverable
- review and amend deliverable according to feedback from relevant supervisor
- despatch deliverable according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scope of job role in the context of legislation, regulations and codes of practice
- key principles of administrative law
- elements of administrative law action
- types of administrative law matters
- bodies of review for administrative decisions and their processes
- types of administrative law remedies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace policies and procedures and reference materials relevant to performance evidence

- background information on courts, tribunals, their jurisdiction and behavioural requirements
- legislation and regulations relevant to common administrative law matters.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG532 Assist with court procedure

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist in court procedure contexts and processes of litigation.

The unit applies to individuals who work under supervision and apply solutions to a range of unpredictable problems and analyse and evaluate information from a variety of sources.

Its application in the workplace is determined by the job role of the individual and legislation, rules, regulations and codes of practice relevant to different jurisdictions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assess matter in dispute | 1.1 Identify task requirements 1.2 Liaise with designated individual about the matter in dispute 1.3 Prepare relevant costing documents 1.4 Identify and consider options to litigation |
| 2. Prepare and assist in litigation proceedings | 2.1 Determine steps prior to litigation 2.2 Obtain and prepare relevant documentation for designated person according to policies and procedures of the firm |
| 3. Assist with interlocutory process | 3.1 Identify purpose of discovery and associated legal obligations 3.2 Undertake administrative tasks associated with discovery |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|----------------------|
| | process |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses complex textual information from a range of sources and identifies relevant and key information Check documents for accuracy and consistency of information |
| Writing | <ul style="list-style-type: none"> Uses clear, accurate and relevant language to organise and record information and complete workplace documentation |
| Oral Communication | <ul style="list-style-type: none"> Participates effectively in spoken interactions using appropriate language and features for each audience and situation Uses active listening and questioning techniques to confirm and clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical calculations to determine costs |
| Initiative and enterprise | <ul style="list-style-type: none"> Understands and adheres to organisational policies and procedures Keeps up-to-date with relevant legislation or regulations and considers implications of these when planning and undertaking work |
| Planning and organising | <ul style="list-style-type: none"> Plans, sequences and implements tasks according to legislative and organisational requirements Evaluates information to decide on relevance to situation |

Unit Mapping Information

No equivalent unit. Supersedes and is not equivalent to BSBLEG514 Assist with civil procedure.

Links

Companion Volume Implementation Guide is found on VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG532 Assist with court procedure

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply understanding of court procedure in at least one civil matter and at least one criminal matter.

In the course of the above, the candidate must:

- prepare accurate costing documents
- obtain and prepare accurate, compliant and complete litigation documents according to legislative and organisational requirements
- complete administrative tasks for the discovery process.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- distinction in court procedure between civil and criminal proceedings
- alternative methods of dispute resolution
- discovery means in civil and criminal proceedings
- documentation required for civil and criminal proceedings
- policies and procedures of the organisation pertinent to civil and criminal proceedings
- legislation and accepted codes of practice relevant to civil and criminal proceedings
- jurisdictional limits of federal, state and territory courts and tribunals in relation to dispute resolution
- legislation, regulations and policies relevant to civil procedure
- roles of court personnel
- role of the courts and associated personnel for civil and criminal proceedings.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to civil law and common legal matters
- workplace policies and procedures and reference materials relevant to performance evidence
- background information on courts, their jurisdiction and behavioural requirements.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG533 Support alternative dispute resolution processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to support alternative dispute resolution processes.

The unit applies to those who apply well established theoretical knowledge in the provision of support for the resolution of disputes.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to support resolution | 1.1 Identify task requirements 1.2 Confirm scope of role in dispute resolution with supervisor 1.3 Identify key facts of dispute, position of parties and desired outcomes 1.4 Assess applicable legislation and common law principles for resolution of case |
| 2. Support resolution of dispute | 2.1 Access and prepare documents for note-taking according to organisational policies and procedures 2.2 Develop notes of mediation or arbitration proceedings according to task and organisational requirements 2.3 Collate additional information or documents for final |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | documentation |
| 3. Finalise support for dispute resolution | 3.1 Discuss and analyse dispute resolution process and outcome with supervisor 3.2 Review and amend dispute resolution paperwork with supervisor 3.3 Despatch information and paperwork to parties according to task and organisational requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Oral communication | <ul style="list-style-type: none"> Listens to clear, sequenced instructions of several steps and asks clarifying questions as required |
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information to determine job requirements |
| Writing | <ul style="list-style-type: none"> Completes a range of forms accurately and legibly using correct technical vocabulary Uses clear, accurate and relevant language to transcribe events and complete documentation |
| Teamwork | <ul style="list-style-type: none"> Cooperates with others as a part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability |
| Initiative and enterprise | <ul style="list-style-type: none"> Takes personal responsibility for adherence to legal and regulatory requirements |
| Problem solving | <ul style="list-style-type: none"> Takes responsibility for routine decisions related directly to own role Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficient and effective outcomes |
| Technology | <ul style="list-style-type: none"> Uses familiar digital technologies and systems to access information, and enter and store data |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG533 Support alternative dispute resolution processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support alternative dispute resolution processes on at least three occasions, including at least one mediation and at least one arbitration.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- dispute resolution processes for conflicts including alternative dispute resolution processes
- types of alternative dispute resolution processes
- advantages and disadvantages of types of alternative dispute resolution processes
- key facts, position and intended outcomes of case
- content and preparation of alternative dispute resolution documents
- organisational policies and procedures for alternative dispute resolution processes
- alternative dispute resolution legislation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to alternative dispute resolution processes
- workplace policies and procedures and reference materials relevant to performance evidence
- background information on alternative dispute resolution processes.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBLEG534 Take instructions in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to take instructions from a client in a legal services environment to support the organisation's operations.

The unit applies to those work under supervision and apply solutions to a range of unpredictable problems and analyse and evaluate information from a variety of sources.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Legal Services

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to take instruction | 1.1 Identify task requirements 1.2 Consult with supervisor to establish scope of personal responsibility in relation to task 1.3 Assemble resources required to take instructions according to organisational policies and procedures 1.4 Develop questions to ask during instruction |
| 2. Take instruction | 2.1 Greet and establish rapport with client under supervision and according to task requirements 2.2 Gather information using questioning techniques according to task and legislative requirements 2.3 Clarify client information according to task requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|---|
| | 2.4 Complete documentation according to task and legislative requirements |
| 3. Finalise and follow-up instruction | 3.1 Review client instruction process with supervisor 3.2 Analyse and organise information gathered according to task and organisational requirements 3.3 Document and store information according to task requirements and organisational policies and procedures 3.4 Identify and implement client-instruction follow-up process |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Oral communication | <ul style="list-style-type: none"> Uses active listening and questioning techniques to confirm understanding |
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses textual information and identifies relevant and key information |
| Writing | <ul style="list-style-type: none"> Uses clear, accurate and relevant language to organise, record and update information |
| Initiative and enterprise | <ul style="list-style-type: none"> Adheres to organisational policies and procedures |
| Planning and organising | <ul style="list-style-type: none"> Plans, sequences and completes work tasks to achieve required outcomes Analyses information to make decisions in relatively complex situations, taking a range of factors into account |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBLEG534 Take instructions in a legal services environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- take instructions from at least four clients in relation to different legal matters.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- common client instruction process and techniques
- organisational policies and procedures for taking instruction including follow-up processes
- legislation relevant to taking instruction in a legal environment
- key client information required for task requirements
- documentation storage processes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation relevant to taking instruction in a legal environment
- workplace reference materials relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMED301 Interpret and apply medical terminology appropriately

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to understand and respond to instructions; to carry out routine tasks and communicate with a range of internal/external clients in a medical environment; as well as use appropriate medical terminology.

It applies to individuals who apply a broad range of competencies in various medical administration contexts. They may exercise discretion and judgment using appropriate knowledge to provide technical advice and support to a team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Medical Services Administration

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Respond appropriately to instructions which contain medical terminology | 1.1 Receive, interpret and document written and oral instructions using medical terminology 1.2 Use checklists where appropriate 1.3 Interpret abbreviations for specialised medical terminology 1.4 Interpret and adhere to the policies and procedures of the |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | workplace 1.5 Seek clarification when necessary |
| 2. Carry out routine tasks | 2.1 Use medical terminology correctly in the completion of routine tasks 2.2 Seek assistance from supervisor or experienced staff member as required |
| 3. Use appropriate medical terminology in oral and written communication | 3.1 Use appropriate medical terminology as directed, in oral communication with patients, fellow workers and health professionals 3.2 Use appropriate medical terminology as directed, in written communication with patients, fellow workers and health professionals 3.3 Present written communication to a designated person for verification if required 3.4 Spell and pronounce medical terminology correctly |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|-----------------------------------|--|
| Reading | 1.1-1.4, 3.2, 3.4 | <ul style="list-style-type: none"> Interprets technical language within various texts Determines how content can be used appropriately in the workplace |
| Writing | 1.1, 1.2, 1.5, 2.1, 3.2, 3.3, 3.4 | <ul style="list-style-type: none"> Uses clear, specific and industry related terminology to complete and update workplace documentation |
| Oral Communication | 1.5, 2.1, 2.2, 3.1, 3.2, 3.4 | <ul style="list-style-type: none"> Pronounces complex and specific words correctly and uses them in the correct context Seeks the view and opinions of others by listening and questioning |
| Navigate the world of work | 1.4 | <ul style="list-style-type: none"> Understands and operates within organisational procedures and policies |
| Interact with others | 1.1, 1.5, 2.2, 3.1-3.3 | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own |

| | | |
|-------------------|----------|--|
| | | role |
| Get the work done | 1.1, 1.2 | <ul style="list-style-type: none">Plans a range of routine tasks, accepting goals and aiming to achieve them efficiently |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBMED301 Interpret and apply medical terminology appropriately | BSBMED301B Interpret and apply medical terminology appropriately | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMED301 Interpret and apply medical terminology appropriately

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- interpret and follow written instructions containing medical terminology
- produce documents containing correct medical terminology according to organisational requirements
- use medical terminology correctly in oral communications
- identify and use appropriate abbreviations for medical terms and associated processes.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline medical terminology relevant to the practice, including the fundamental word structure used in medical terms
- outline the relevant policies and procedures
- identify sources of information available to check on medical terminology.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the medical services administration field of work and include access to:

- office equipment and resources
- examples of documentation
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMED302 Prepare and process medical accounts

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to provide advice to patients regarding fee structures and process referrals, as well as prepare and process medical accounts for a range of patients.

This unit applies to individuals who apply a broad range of competencies in various medical administration contexts. They may exercise discretion and judgement using appropriate knowledge to provide technical advice and support to a team.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Medical Services Administration

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Provide advice to patients about fee structure | 1.1 Identify and advise patients of fee schedule for different services 1.2 Advise patients regarding entitlements and rebates 1.3 Schedule medical appointments using appropriate booking and account systems |
| 2. Process referrals to | 2.1 Check referrals to ensure validity |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| specialist practitioners | 2.2 Follow correct procedures for referral 2.3 File referral letters according to legislation and workplace policies and procedures |
| 3. Prepare medical accounts for bulk billed and private patients | 3.1 Accurately follow procedures for billing based on account type 3.2 Identify and cost procedures which are not eligible for Medicare rebate 3.3 Select and complete appropriate account and billing documentation according to workplace and legislative requirements 3.4 Follow procedures for preparing Veterans' Affairs, workers' compensation and motor vehicle third party accounts accurately 3.5 Forward medical account to designated person or organisation according to legislation and account processing procedures |
| 4. Process accounts | 4.1 Receive and document payments 4.2 Prepare and issue receipts to person or authority according to legislation and workplace policies and procedures 4.3 Reconcile Medicare payments with claims made by the medical practice 4.4 Follow up overdue accounts 4.5 Provide and store financial records and data in accordance with policies and procedures of the workplace |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|---|---|
| Reading | 1.1, 1.3, 2.1, 2.2, 2.3, 3.1-3.5, 4.1-4.5 | <ul style="list-style-type: none"> Recognises text within job specifications and work processes related to the processing and preparation of medical accounts |
| Writing | 1.3, 2.2, 2.3, 3.1-3.5, 4.1-4.5 | <ul style="list-style-type: none"> Records and uses appropriate written communication when preparing medical accounts and in various other medical administration contexts |
| Oral | 1.1, 1.2, 4.4 | <ul style="list-style-type: none"> Uses everyday language with patients to provide advice relating to the fee structure for different |

| | | |
|----------------------------|--|---|
| Communication | | services as well as following up overdue accounts |
| Numeracy | 1.1, 3.2, 3.3, 3.4, 4.1, 4.2, 4.3, 4.4 | <ul style="list-style-type: none">• Uses basic mathematical calculations and arranges sequential numerical information when dealing with fees and processing medical accounts |
| Navigate the world of work | 2.2, 2.3, 3.1, 3.3, 3.4, 3.5, 4.2, 4.5 | <ul style="list-style-type: none">• Recognises and responds to organisational and legislative requirements for tasks |
| Get the work done | 1.1, 1.3, 2.1, 2.3, 3.1, 3.3, 3.5, 4.1-4.5 | <ul style="list-style-type: none">• Plans and organises workload and commitments to ensure work is completed in a timely manner• Uses digitally based systems and technologies to access, organise and present information |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBMED302 Prepare and process medical accounts | BSBMED302B Prepare and process medical accounts | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMED302 Prepare and process medical accounts

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- provide accurate and clear advice to patients about a range of entitlements and benefits
- use an appointment system to schedule medical appointments
- process referrals according to legislative and organisational requirements
- prepare, process and store medical accounts and payment records according to legislative and organisational requirements
- follow up unpaid accounts.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline Medicare entitlements
- outline public and private health insurance systems
- discuss key aspects of relevant legislation, regulations, standards and codes of practice that affect workplace operations
- describe the differences between workers' compensation, TAC and Veterans' Affairs claims
- explain procedures for patients without a Medicare card or number.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the medical services administration field of work and include access to:

- office equipment and resources

- examples of documentation
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMED303 Maintain patient records

Modification History

| Release | Comments |
|-----------|--|
| Release 2 | This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent. |
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to maintain patient records within an existing medical records management system, under the supervision of a senior receptionist or practice manager.

It applies to individuals who apply a broad range of competencies in various medical administration contexts. They are skilled operators who are expected to exercise discretion and judgement in accessing and maintaining patient records while fully respecting patient privacy and the confidentiality of their details.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Medical Services Administration

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify and clarify | 1.1 Determine own role and responsibilities within patient |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| own role and procedures for patient recordkeeping | <p>recordkeeping system through consultation with relevant personnel or via organisational policy and procedures manual</p> <p>1.2 Access documented procedures for patient recordkeeping system and read for understanding</p> <p>1.3 Seek clarification with relevant personnel of unclear or ambiguous procedures</p> |
| 2. Access patient records | <p>2.1 Gain access to patient records to facilitate patient visit</p> <p>2.2 Check currency and accuracy of patient demographic and personal details</p> <p>2.3 Create new records according to enterprise protocols</p> <p>2.4 Check records following patient visits, for practitioners' instructions related to follow-up action</p> <p>2.5 Store patient records according to organisational policy and procedures</p> |
| 3. Help maintain records | <p>3.1 Make required checks of patient records</p> <p>3.2 Carry out archiving of patient records as required</p> <p>3.3 Transfer patient records to another health facility upon appropriate request for patient information</p> |
| 4. Monitor and review own role | <p>4.1 Monitor and review own role and responsibilities in maintaining patient records to identify opportunities for improvements to system and own work practices</p> <p>4.2 Make recommendations to relevant personnel for improvements to the established procedures and processes for maintaining patient records</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|--|--|
| Reading | 1.1, 1.2, 1.3, 2.2, 2.3, 2.4, 2.5, 3.1, 3.2, 4.2 | <ul style="list-style-type: none"> Recognises and interprets a range of everyday workplace information including organisational procedures and medical data |

| | | |
|----------------------------|----------------------------------|--|
| Writing | 2.3, 3.2, 3.3, 4.2 | <ul style="list-style-type: none"> Creates and maintains records according to organisational requirements Documents recommendations for improved processes using simple vocabulary and required structure |
| Oral Communication | 1.1, 1.3, 4.2 | <ul style="list-style-type: none"> Uses specific vocabulary and active listening and questioning techniques to confirm understanding |
| Navigate the world of work | 1.1, 2.3, 2.5, 3.3 | <ul style="list-style-type: none"> Identifies and works within own roles and responsibilities according to organisational and legislative requirements |
| Interact with others | 1.1, 1.3, 3.3, 4.2 | <ul style="list-style-type: none"> Uses appropriate practices and protocols for workplace communication Collaborates with others to achieve results in immediate work context |
| Get the work done | 1.1, 2.1, 2.5, 3.1-3.3, 4.1, 4.2 | <ul style="list-style-type: none"> Plans and sequences workload to ensure tasks are completed in a timely manner Uses analytical skills to determine recommendations for improvement to established processes and procedures |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|--|---------------------------|--------------------|
| BSBMED303 Maintain patient records Release 2 | BSBMED303 Maintain patient records Release 1 | Updated to clarify intent | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMED303 Maintain patient records

Modification History

| Release | Comments |
|-----------|--|
| Release 2 | This version released with BSB Business Services Training Package Version 2.0. Version created to clarify intent. |
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- use a recordkeeping system to create, access, store and maintain accurate records, according to organisational and legislative requirements
- identify and recommend improvements to recordkeeping system or own work practices
- communicate with relevant people about patient records.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline relevant legislation, standards and/or codes of practice that affect patient recordkeeping
- explain workplace policies and procedures related to patient recordkeeping, including privacy and confidentiality
- describe the process used to set up and maintain a patient record
- explain how coding systems help users to access and to maintain patient records.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the medical services administration field of work and include access to:

- a recordkeeping system
- documented procedures
- case studies and, where possible, real situations
- office equipment and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMED304 Assist in controlling stocks and supplies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to provide assistance in stock control processes within a medical environment. This involves assisting in maintaining stock levels, storing stock, stocktaking and disposing of out-of-date stock.

It applies to individuals who provide assistance in controlling required levels of stocks and supplies in a medical administration context or work area. All work is undertaken in accordance within legislative requirements, Australian and industry standards and codes of practice, and in line with organisational policies, procedures and specific requirements.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Medical Services Administration

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine own role in stock control processes | 1.1 Determine own role in stock control processes by consulting with manager or supervisor 1.2 Access documented procedures for stock control and read for understanding 1.3 Seek clarification with relevant personnel of unclear or ambiguous procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| 2. Assist in maintaining stock levels | 2.1 Monitor stock levels against required levels 2.2 Order stock in a timely manner or in accordance with ordering cycles, to ensure continuity of supplies 2.3 Identify potential shortfalls in stock levels and take action to ensure stock is replenished in a timely manner 2.4 Check orders against enterprise documentation and take appropriate actions where any shortfall is identified 2.5 Complete and store documentation for maintenance of stock levels |
| 3. Store stock | 3.1 Unpack stock and check against order for condition and currency 3.2 Identify damaged or missing stock and take action to replace it 3.3 Store stock according to established storage systems 3.4 Identify and store stock requiring specialised storage 3.5 Rotate stock to minimise stock reaching expiry or use-by-date |
| 4. Assist in stocktaking | 4.1 Provide assistance in stocktaking to identify, count, move and locate items 4.2 Complete and store stocktaking documentation 4.3 Assist with other stocktaking actions as directed |
| 5. Assist in disposal of out-of-date stock and recalls | 5.1 Dispose of stock marked for disposal according to legislation and other industry specific or manufacturer requirements and under direction of supervisor 5.2 Complete and store required documentation of disposal of out-of-date stock |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|------------------------------|--|
| Reading | 1.2, 2.2, 2.4, 2.5, 3.1, 3.5 | <ul style="list-style-type: none"> Recognises text within job specifications and work processes relating to maintaining stock levels and other job-related outcomes |

| | | |
|----------------------------|---|---|
| Writing | 2.2, 2.4, 2.5, 4.1, 4.2, 5.2 | <ul style="list-style-type: none"> Produces familiar text types using simple vocabulary, grammatical structures and numerical text when writing down stock levels, completing documentation and while undertaking administrative tasks |
| Oral Communication | 1.1, 1.3, 4.1, 4.3 | <ul style="list-style-type: none"> Listens closely to directions and asks questions to clarify understanding |
| Numeracy | 2.1-2.5, 3.5, 4.1-4.3, 5.2 | <ul style="list-style-type: none"> Identifies and understands relevant mathematical information while monitoring stock levels, ordering stock and determining out-of-date stock |
| Navigate the world of work | 1.1, 1.2, 5.1, 5.2 | <ul style="list-style-type: none"> Recognises and adheres to organisational policies and procedures and legislative requirements |
| Interact with others | 1.1, 1.3, 2.4, 3.2, 4.1, 4.3 | <ul style="list-style-type: none"> Collaborates and consults with others to clarify own role and the requirements for the stock control process |
| Get the work done | 2.1-2.5, 3.2, 3.3, 3.4, 3.5, 4.1, 4.2, 5.1, 5.2 | <ul style="list-style-type: none"> Plans own workload in accordance with organisational requirements Uses problem-solving skills to analyse storage and disposal requirements |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBMED304 Assist in controlling stocks and supplies | BSBMED304B Assist in controlling stocks and supplies | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMED304 Assist in controlling stocks and supplies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- carry out and document activities according to procedures, including:
 - monitoring stock levels
 - ordering stock
 - unpacking and checking orders
 - storing and rotating stock
 - assisting in stocktaking
 - disposing of out-of-date stock
- communicate with required person if orders are incorrect.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline relevant legislation, regulations, standards and codes of practice that affect stock
- explain enterprise policies and procedures for stock control including recordkeeping requirements for:
 - stock levels
 - stocktaking
 - disposal of out-of-date stock.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the medical services administration field of work and include access to:

- office equipment and resources
- workplace records and processes for stock control
- security arrangements for stock and supplies
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMED305 Apply the principles of confidentiality, privacy and security within the medical environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to apply principles and procedures relating to confidentiality, privacy and security to own work within the medical environment.

It applies to individuals required to maintain confidentiality, privacy and security under legislation, and workplace policies and procedures in a medical environment. It covers working within accepted codes of conduct and following confidentiality, privacy and security provisions.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Medical Services Administration

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Work within accepted codes of conduct | 1.1 Ensure work is reviewed and approved by a health practitioner or senior administrator who has delegated tasks 1.2 Keep records up-to-date and complete tasks as required, neatly, accurately and in a timely manner 1.3 Seek clarification with relevant personnel of unclear or ambiguous procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 1.4 Treat patients, colleagues and health practitioners with respect 1.5 Refer health related matters raised by patients back to medical practitioners 1.6 Act with honesty and integrity at all times 1.7 Communicate conflict of interest or potential conflict of interest promptly to manager or supervisor |
| 2. Follow confidentiality and privacy procedures | 2.1 Assess information and requests for information with regard to what is and what is not disclosable 2.2 Use discretion and judgement in all communications 2.3 Discuss patient-related matters within the confines of the facility and with appropriate personnel only 2.4 Seek advice and clarification with relevant personnel where potential confidentiality issues arise in dealings with patients, their families and others |
| 3. Follow security procedures | 3.1 Store and appropriately secure patient records and other confidential documentation 3.2 Clearly label and store securely according to organisational policies and procedures, all documents required by legislation to be stored for certain periods 3.3 Ensure drugs, equipment and other materials potentially posing a work health and safety (WHS) threat to others are stored securely at all times |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|------------------------------|---|
| Reading | 1.2, 2.1, 3.1, 3.2 | <ul style="list-style-type: none"> Recognises familiar text types within job specifications and regulatory requirements and uses different strategies to identify relevant information |
| Writing | 1.2, 3.2 | <ul style="list-style-type: none"> Produces records and labels according to workplace requirements |
| Oral Communication | 1.1, 1.3, 1.4, 1.5, 1.7, 2.4 | <ul style="list-style-type: none"> Uses appropriate language and non-verbal features to provide information |

| | | |
|---------------------------|--|--|
| | | <ul style="list-style-type: none"> Obtains information from others by active listening and questioning |
| Navigate the work of work | 1.6, 2.1, 2.2, 3.1, 3.2, 3.3 | <ul style="list-style-type: none"> Operates according to ethical guidelines and legislative requirements Follows organisational procedures and protocols |
| Interact with others | 1.1, 1.3, 1.4, 1.5, 1.7, 2.2, 2.3, 2.4 | <ul style="list-style-type: none"> Collaborates with others to achieve outcomes, playing an active role in facilitating respectful interactions |
| Get the work done | 1.1, 1.2, 1.7, 2.1, 3.1, 3.2 | <ul style="list-style-type: none"> Plans and sequences workload to ensure tasks are completed accurately and in a timely manner Takes responsibility for the outcomes of routine decisions related directly to own role Recognises and takes responsibility for addressing predictable problems in familiar work contexts Understands the importance of secure information and privacy in relation to own work |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBMED305 Apply the principles of confidentiality, privacy and security within the medical environment | BSBMED305B Apply the principles of confidentiality, privacy and security within the medical environment | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMED305 Apply the principles of confidentiality, privacy and security within the medical environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- communicate with others according to accepted codes of conduct
- assess whether information is disclosable
- identify and communicate a conflict of interest
- store records and confidential documentation according to organisational requirements
- identify and store drugs, equipment and materials requiring secure storage appropriately.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain enterprise policies and procedures for confidentiality, privacy and security
- identify relevant legislation relevant to confidentiality, privacy, security, record storage and work health and safety practices.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the medical services administration field of work and include access to:

- office equipment and resources
- case studies or actual experiences related to confidentiality, privacy and security issues.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMED401 Manage patient recordkeeping system

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to manage a patient recordkeeping system within a medical environment and to supervise others. It covers clarifying roles and responsibilities, managing the operation of a patient recordkeeping system, and reviewing and improving the system. The unit does not cover the design of a new system but does cover reviews and improvements to an existing system.

It applies to individuals managing an existing recordkeeping system (and sub-systems within the overall system) in a medical context. It may involve supervising the work of other personnel who implement the system and maintain patient records day-to-day. It also involves working with users of the system such as the health practitioners in the enterprise.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Medical Services Administration

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Clarify how patient records system operates | 1.1 Access policies and procedures for patient records 1.2 Consult relevant personnel about how the system operates 1.3 Determine roles and responsibilities for the system operations 1.4 Communicate roles and responsibilities for system operations |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | to relevant personnel |
| 2. Manage operation of patient records system | 2.1 Supervise staff maintaining patient records 2.2 Provide staff maintaining patient records with training as required 2.3 Regularly consult staff using patient records about system efficacy 2.4 Maintain integrity of patient records 2.5 Maintain security of patient records 2.6 Stress importance of confidentiality of patient records to all staff, who handle or have access to patient files 2.7 Provide authorisation of transfer of records from the workplace according to policies and procedures 2.8 Archive records as appropriate |
| 3. Review and improve patient records system | 3.1 Monitor and review implementation of the system to identify improvements 3.2 Make recommendations to relevant personnel for system improvements 3.3 Implement approved recommendations 3.4 Supervise staff maintaining patient records to implement changes 3.5 Plan and deliver any required training for staff to implement changes made to the system |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|--|--|
| Reading | 1.1, 1.3, 1.4, 2.1, 2.5, 2.7, 2.8, 3.1-3.5 | <ul style="list-style-type: none"> Identifies and interprets relevant information and ideas within organisational texts |
| Writing | 1.4, 2.1, 2.2, 2.3, 2.4, 2.7, 2.8, 3.1-3.5 | <ul style="list-style-type: none"> Creates and maintains records using required words and codes Prepares documentations for others using words and |

| | | |
|----------------------------|---|---|
| | | style appropriate to audience and context |
| Oral Communication | 1.2, 1.4, 2.1, 2.2, 2.3, 2.6, 3.2, 3.4, 3.5 | <ul style="list-style-type: none"> Communicates with relevant personnel and uses everyday language to train or supervise staff Asks questions and listens for relevant information in oral texts |
| Navigate the world of work | 1.1, 1.3, 2.6 | <ul style="list-style-type: none"> Identifies and works according to roles and responsibilities, policies and procedures Ensures own and others behaviour is consistent with the expected policies, procedures and responsibilities related to privacy, confidentiality and security in a medical environment |
| Interact with others | 1.2, 1.4, 2.1, 2.2, 2.3, 3.2, 3.4, 3.5 | <ul style="list-style-type: none"> Collaborates with relevant personnel to ensure understanding of the records system Selects and uses appropriate communication practices when providing training or feedback to others |
| Get the work done | 1.1-1.4, 2.1-2.5, 2.8, 3.1-3.5 | <ul style="list-style-type: none"> Plans and organises own and others' tasks to ensure work is completed according to legislative and organisational requirements Uses analytical processes to determine opportunities for improvements to processes |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBMED401 Manage patient record-keeping system | BSBMED401B Manage patient recordkeeping system | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMED401 Manage patient recordkeeping system

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- manage a patient recordkeeping system and supervise its use
- document how records have been accessed and archived by staff or self in accordance with organisational and legislative requirements
- provide activities to others that support correct use of a patient record system.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline relevant legislation, regulations, standards and codes of practice for maintaining records in a medical environment
- explain enterprise policies and procedures related to:
 - patient recordkeeping including archiving and records transfer
 - privacy and confidentiality
 - access to records
- describe filing systems and record management processes
- explain how medical coding is used to help access and maintain patient records.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the medical services administration field of work and include access to:

- office equipment and resources

- documents and records
- a records system
- documented procedures
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG431 Assess marketing opportunities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify marketing opportunities and to analyse and evaluate opportunities according to organisational marketing objectives.

The unit applies to individuals working in a variety of marketing communications occupational roles who have responsibility for a range of tasks involving analysis and planning.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify marketing opportunities | 1.1 Select target market according to task requirements and in consultation with required personnel 1.2 Establish marketing objectives, organisational structure, and business and marketing plans according to task and organisational requirements 1.3 Review existing marketing clients and external environment for gaps and opportunities 1.4 Research and document marketing opportunities according to target market |
| 2. Analyse opportunities | 2.1 Perform a market segmentation according to task requirements 2.2 Identify relevant marketing factors for analysis of market |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------|---|
| | segmentation according to task requirements 2.3 Review market segments against identified marketing factors 2.4 Identify opportunities for focus of marketing efforts |
| 3. Evaluate opportunities | 3.1 Analyse opportunities against marketing objectives 3.2 Select preferred marketing opportunities in consultation with relevant personnel 3.3 Document opportunities for presentation to management |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses a variety of textual information from a range of sources to identify relevant and key information |
| Writing | <ul style="list-style-type: none"> Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience |
| Oral Communication | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges using suitable language and non-verbal features |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical skills to interpret and process data and statistical information |
| Self-management | <ul style="list-style-type: none"> Adheres to implicit and explicit organisational goals, policies and procedures |
| Planning and organising | <ul style="list-style-type: none"> Develops and implements plans to manage relatively complex, non-routine tasks with an awareness of how they contribute to organisational goals Makes decisions by systematically analysing information, identifying and evaluating options against set criteria, and choosing most appropriate option |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBMKG401 Profile the market
- BSBMKG408 Conduct market research.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG431 Assess marketing opportunities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify and evaluate at least three different marketing opportunities according to task requirements.

In the course of the above, the candidate must:

- identify and research marketing opportunities
- perform a market segmentation and identify marketing focus using segmentation results
- evaluate and select preferred marketing opportunities in consultation with relevant personnel
- document and present selected opportunities to management.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- requirements of legislation affecting marketing roles
- data collection and analysis techniques
- marketing industry knowledge, including:
 - components of marketing mix
 - elements of marketing planning
- marketing communications concepts and processes
- organisational structures, roles, responsibilities, business and marketing plans
- relevant product and service standards
- best practice techniques related to marketing
- relevant statistical terms used by the Australian Bureau of Statistics.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG432 Research international markets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to undertake market research to select international markets to pursue.

The unit applies to individuals working with minimal supervision but with support and assistance of a more senior person within the organisation. The activities focus on the target market and involve communication and executing tasks across cultural and geographic barriers. The tasks involve marketing goods and services internationally include selecting and implementing appropriate marketing activities and monitoring and reviewing marketing performance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to research | 1.1 Identify international market to research from brief or manager 1.2 Identify and confirm research objectives and information requirements from brief or with manager 1.3 Identify and access sources of information relevant to international market research |
| 2. Perform research | 2.1 Analyse information sources according to task requirements 2.2 Apply statistical analysis tools to information to identify trends 2.3 Analyse factors that influence trends |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------|---|
| | 2.4 Document and report identified trends and factors that influence trends to relevant personnel |
| 3. Finalise research | 3.1 Develop marketing recommendations from research according to task requirements and document according to organisational policies and procedures 3.2 Communicate marketing recommendations to relevant personnel and identify any changes required 3.3 Implement changes identified to the marketing recommendations |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to organisational requirements |
| Writing | <ul style="list-style-type: none"> Integrates information from a number of sources to develop material that supports purposes and format of documentation using suitable grammatical structure and clear, logical language |
| Oral Communication | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges using suitable language and non-verbal features Uses active listening and questioning techniques to confirm requirements and understanding |
| Numeracy | <ul style="list-style-type: none"> Collates and interprets numeric information and analyses trend data relevant to marketing activities |
| Self-management | <ul style="list-style-type: none"> Seeks assistance and guidance from others, as required |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for planning, organising, confirming and completing tasks to achieve required outcomes Evaluates effectiveness of decisions in terms of how well they meet stated goals Initiates standard procedures when responding to familiar problems within immediate context |
| Technology | <ul style="list-style-type: none"> Uses digital tools to complete tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG415 Research international markets.

Supersedes but is not equivalent to:

- BSBINT301 Apply knowledge of the international trade environment to complete work
- BSBINT401 Research international business opportunities
- BSBINT409 Plan for international trade.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG432 Research international markets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- research at least three different international markets.

In the course of the above, the candidate must:

- identify and document trends in target market according to task requirements
- apply statistical analysis to identify trends
- develop recommendations from research according to task requirements
- document and communicate recommendations to relevant personnel according to task requirements and organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- cultural aspects relevant to research of international markets
- market research techniques and tools, including statistical analysis
- formats for reporting research outcomes
- external and internal information sources related to international markets.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation for market research.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG433 Undertake marketing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prepare, coordinate and review basic marketing activities. It is a foundation unit covering general and basic marketing activities that do not require detailed or complex planning or implementation.

The unit applies to individuals working in a variety of occupational roles who have responsibility for a range of tasks involving marketing, analysis and planning. It could be undertaken as part of a broader role of a person in a small enterprise, or as part of a marketing plan for a larger enterprise.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to undertake marketing activity | 1.1 Identify task requirements according to organisation's marketing plan and relevant policies and procedures 1.2 Review marketing activities according to industry trends and competitive activity 1.3 Develop and document action plan for marketing activities according to task requirements 1.4 Seek approval of action plans from relevant personnel |
| 2. Co-ordinate marketing activities | 2.1 Identify and access resources required for marketing activities according to action plan |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|--|
| | 2.2 Contribute to assigning responsibilities and functions to relevant marketing personnel 2.3 Assist required personnel in managing marketing activities 2.4 Monitor implementation of marketing activities according to activity plan, as required |
| 3. Review marketing activities | 3.1 Measure and record outcomes of marketing activities against marketing plan 3.2 Review results of activities against expected marketing plan outcomes 3.3 Prepare report of marketing activities and share with relevant personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to organisational requirements |
| Writing | <ul style="list-style-type: none"> Integrates information from a number of sources to develop material that supports purposes and format of documentation, using suitable grammatical structure and clear, logical language |
| Oral Communication | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges using suitable language and non-verbal features |
| Numeracy | <ul style="list-style-type: none"> Collates and analyses numeric information relating to costs, timeframes and other activities |
| Self-management | <ul style="list-style-type: none"> Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment Takes responsibility for outcomes of routine decisions related directly to own role |
| Problem solving | <ul style="list-style-type: none"> Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage tasks with an awareness of how they may contribute to longer term operational and strategic goals |
| Technology | <ul style="list-style-type: none"> Identifies functions and key features of common digital systems and tools and operates them effectively to complete routine tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG414 Undertake marketing activities.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG433 Undertake marketing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support marketing activities for a product or service, including:
 - researching marketing practices of the organisation
 - planning and implementing a marketing activity
 - recording activities and processes used in marketing activity.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- concept of marketing, including concepts relating to:
 - production
 - products
 - selling
 - societal marketing
- sources of marketing information
- basic foundations of marketing practices
- organisational marketing policies and procedures
- specific product knowledge related to products and services being marketed.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources relevant to performance evidence

- examples of products or services to be marketed
- marketing plans, policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG434 Promote products and services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to coordinate and review the promotion of an organisation's products and/or services.

The unit applies to individuals with a broad knowledge of the promotion of products and services specific to an organisation. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish promotional activities | 1.1 Identify need for promotion of product or service according to organisational and market requirements 1.2 Identify overall promotional objectives in consultation with relevant stakeholders 1.3 Analyse and select promotional activity options for meeting promotional objectives 1.4 Determine contingency strategies for selected activity options |
| 2. Coordinate promotional activities | 2.1 Allocate roles and responsibilities for delivery of promotional services and communicate to relevant personnel 2.2 Monitor progress of promotional activities according to action plan |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|---|
| | 2.3 Identify and address potential issues during implementation within scope of own responsibility 2.4 Apply determined contingency strategies, if required |
| 3. Review promotional activities | 3.1 Analyse effectiveness of planning processes using feedback and data 3.2 Identify possible improvements in future activities 3.3 Collect feedback and provide to others involved in promotional activity 3.4 Analyse costs and timelines for benefits accruing from the promotional activities 3.5 Prepare conclusions and recommendations relating to effectiveness of promotional activities |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets, analyses and collates textual information relevant to promotional activities from a range of sources |
| Writing | <ul style="list-style-type: none"> Uses clear and specific language to develop formal and informal documents for different audiences in accordance with organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Actively participates in verbal exchanges of ideas and elicits the views and opinions of others by listening and questioning Uses clear and specific language to clarify, explain and present information relating to the promotional activity |
| Numeracy | <ul style="list-style-type: none"> Classifies, analyses and compares numeric information, including costs and timelines, relevant to the promotional activity |
| Self-management | <ul style="list-style-type: none"> Adheres to legislative requirements and organisational policies and procedures Evaluates effectiveness of decisions in terms of how well they meet stated goals |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols with a range of stakeholders to project a professional image while seeking or sharing information Recognises the importance of building rapport to establish and maintain positive working relationships |
| Planning and | <ul style="list-style-type: none"> Sequences and schedules complex activities, monitors |

| Skill | Description |
|------------|--|
| organising | implementation and manages relevant communication |
| Technology | <ul style="list-style-type: none">• Uses a range of digital tools to access data, and to extract, organise, integrate and share relevant information |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG413 Promote products and services.

Supersedes but is not equivalent to:

- BSBPRO301 Recommend products and services
- BSBPRO401 Develop product knowledge.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG434 Promote products and services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- Promote at least three products or services.

In the course of the above, the candidate must:

- identify the context for the promotional activities, including:
 - relevant legislation and regulations
 - organisation's goals, objectives, systems, policies and procedures
 - budget and timelines
 - marketing needs and, if defined, marketing plans
 - objectives of the promotional activities
- consult with relevant stakeholders to plan promotional activities to meet objectives, budget and timelines
- coordinate promotional activities including:
 - allocating roles and responsibilities
 - using communication channels to convey responsibilities
 - obtaining relevant resources and promotional products
- analyse feedback and data to evaluate the effectiveness of planning processes and promotional activities and make recommendations on future directions of promotional activities.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory context of the organisation as relevant to promotional activities
- content of action plans, including:
 - task steps

- costs
- timeframe
- resources and responsibilities
- internal and external stakeholders involved in coordinating promotional activities
- planning processes for organising promotional activities
- organisation's marketing objectives and how they support the overall business objectives
- common promotional activities that could be used to support the marketing objectives.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes for promoting products and services
- workplace documentation and resources for promoting products and services.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG435 Analyse consumer behaviour

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to analyse consumer behaviour for markets and specific needs.

The unit applies to individuals who need to analyse consumer behaviour to examine factors that impact on decisions to purchase products or services. They conduct a thorough analysis of consumer attitudes and behaviour and make recommendations on marketing strategies to increase consumption of the product or service being marketed.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate drivers of consumer behaviour | 1.1 Source information on market for a product or service according to marketing plan 1.2 Identify consumer attributes for market from market profile and existing customer data 1.3 Identify and compare features of product or service according to marketing plan 1.4 Investigate consumer need for the product or service through analysis of trends and past performance, where possible |
| 2. Evaluate reasons for existing levels of | 2.1 Analyse consumer responses to previous marketing communications |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|--|
| consumer interest | 2.2 Review relevant data and determine consumer digital footprints, engagement journeys and expectations 2.3 Assess organisational capability and respond to consumer demand for products or services |
| 3. Recommend marketing focus | 3.1 Outline how influences on consumer behaviour will be used to target effective marketing strategies and present a rationale for marketing focus 3.2 Clarify the role of the consumer in the digital marketing environment and model engagement conversations and interventions 3.3 Confirm focus of appeal meets legal and ethical obligations and budgetary requirements of marketing plan |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses text from a range of sources to identify relevant and key information |
| Writing | <ul style="list-style-type: none"> Prepares strategic business documentation incorporating appropriate vocabulary, grammatical structure and conventions appropriate to purpose and audience |
| Oral Communication | <ul style="list-style-type: none"> Gathers information through active listening and questioning Presents information using suitable words and non-verbal features |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical skills and techniques to interpret and process data and analyse trends |
| Self-management | <ul style="list-style-type: none"> Complies with implicit and explicit organisational procedures and processes Adheres to ethical, legal and regulatory responsibilities relevant to own work context |
| Teamwork | <ul style="list-style-type: none"> Selects and applies appropriate form and mode of communication for a specific purpose and audience |

| Skill | Description |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Develops plans to manage relatively complex tasks with an awareness of how they may contribute to longer-term operational and strategic goals• Makes decisions by systematically analysing information, identifying and evaluating options against set criteria, and choosing most appropriate option |
| Technology | <ul style="list-style-type: none">• Uses a range of digital tools to access data, and to extract, organise, integrate and share relevant information |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG419 Analyse consumer behaviour.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG435 Analyse consumer behaviour

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- analyse the behaviour of two different consumer types.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- industry, product and service knowledge for analysis of consumer behaviour
- marketing communication concepts and processes
- current digital channels relevant to the business and consumer
- objectives of marketing strategy including:
 - addressing innate and acquired needs of consumers
 - appealing to motives that influence decision-making
- organisational structures, procedures and marketing objectives.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to business consumer behaviour
- workplace documentation and resources relevant to consumer behaviour analysis
- software and technology for consumer behaviour analysis.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG436 Design and test direct marketing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to design, test and evaluate direct marketing activities which meet organisational marketing objectives.

The unit applies to individuals who are required to create and implement direct marketing activities for products or services. Such individuals may work in small, medium or large enterprises across a variety of industries and they usually work with a team and customers to design offers.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop direct marketing activity | 1.1 Determine objectives, target audience and goals for direct marketing 1.2 Identify types of direct marketing and select the most suitable form according to marketing objectives and goals 1.3 Make a plan for layout of direct marketing activities |
| 2. Prepare for testing marketing activity | 2.1 Identify objectives and parameters for testing direct marketing activities 2.2 Identify components of direct marketing for testing according to task objectives 2.3 Analyse and select testing method according to task objectives |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------|---|
| | 2.4 Perform test according to parameters and task objectives |
| 3. Evaluate test results | 3.1 Collate results according to organisational policies and procedures 3.2 Use statistical techniques to analyse results 3.3 Refine direct response offers according to results obtained 3.4 Document and present results to relevant personnel according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses textual data from a range of sources and identifies relevant and key information |
| Writing | <ul style="list-style-type: none"> Integrates information from a number of sources to develop material that supports purposes and format of documentation using suitable grammatical structure and clear, logical language |
| Oral Communication | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges using suitable language and features Elicits views and opinions of others with active listening and questioning |
| Numeracy | <ul style="list-style-type: none"> Examines and analyses numerical information to determine pricing strategies and payment terms |
| Self-management | <ul style="list-style-type: none"> Identifies, develops and follows explicit and implicit protocols and meets expectations associated with own role |
| Problem solving | <ul style="list-style-type: none"> Responds intuitively to problems requiring immediate attention, quickly drawing on past experience to devise solutions |
| Planning and organising | <ul style="list-style-type: none"> Applies formal processes when planning more complex tasks, producing plans with logically sequenced steps Selects from a range of options in routine situations, identifying and taking some situational factors into account when decision-making |
| Technology | <ul style="list-style-type: none"> Identifies functions and key features of common digital systems and tools and operates them effectively to complete routine tasks |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBMKG409 Design direct response offers
- BSBMKG410 Test direct marketing activities
- BSBMKG411 Analyse direct marketing databases.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG436 Design and test direct marketing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- design and test at least three direct marketing activities.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- marketing communication concepts and processes
- media options for direct marketing activities
- statistical methods, tests and techniques can be used for measurement and analysis
- software applications used in direct marketing.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG437 Create and optimise digital media

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to create and optimise digital media impact for application within the context of marketing communications.

The unit applies to individuals working in a variety of marketing communications roles who have responsibility for developing and implementing client solutions within the digital communications space. Individuals may work individually or as part of a multidisciplinary team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to promote digital media | 1.1 Identify measurable impact objectives for digital media 1.2 Analyse existing online and offline channel data for insights and gaps in engagement and expectations 1.3 Identify tools and technologies accessed by customers 1.4 Establish audience engagement characteristics, expectations and responses |
| 2. Support optimisation of digital media | 2.1 Use technology to create a deliverable according to task and organisational requirements 2.2 Develop strategies for rapid real-time response, and changes |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|---|
| | 2.3 Model channel interaction options 2.4 Test interaction with target groups 2.5 Adapt deliverable according to test outcomes and verify with relevant personnel |
| 3. Evaluate digital media use | 3.1 Collate digital data on customer engagement, conversations and conversions 3.2 Moderate data to identify exceptions from agreed performance 3.3 Document issues and recommendations to improve further digital media optimisation |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information to establish current industry and project status from relevant information |
| Writing | <ul style="list-style-type: none"> Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience |
| Oral Communication | <ul style="list-style-type: none"> Presents information and seeks advice using language appropriate to audience |
| Numeracy | <ul style="list-style-type: none"> Identifies and interprets data from a range of sources Uses modelling capacity and data analysis to establish and test systems, monitor results and make adjustments |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external parties to seek or share information Works effectively with other experts as part of a multi-disciplinary network to achieve desired outcomes for organisation and clients |
| Planning and organising | <ul style="list-style-type: none"> Plans and organises data categories, tasks and workloads Uses testing to identify and solve routine and non-routine problems Sequences and schedules complex activities, monitors implementation, and manages relevant communication |
| Technology | <ul style="list-style-type: none"> Uses and manipulates digital technology to create, extend and enhance job role, products and capacity to deliver optimised |

| Skill | Description |
|-------|---|
| | <p>digital media</p> <ul style="list-style-type: none">• Uses tools and technologies for visualisations, dashboards and reports for a unified view across multiple digital platforms• Identifies and responds to rapidly changing expectations within digital sphere |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG421 Optimise digital media impact.

Supersedes but is not equivalent to BSBMKG420 Create digital media user experiences.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG437 Create and optimise digital media

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- create and optimise at least two different digital media.

In the course of the above, the candidate must:

- establish digital channel performance measures
- analyse digital media data and offline information and determine engagement characteristics of target audience
- identify variation between target and actual performance
- model and test alternative methods and techniques to optimise digital impact
- respond to changing expectations, feedback and technological environment
- use tools and technologies to monitor digital activity
- use data evaluation methods.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- current industry tools and technologies used in digital media channels
- types of digital deliverables, including:
 - visualisations
 - dashboards
- industry level performance metrics and measures
- characteristics of users across alternative digital channels
- nodes of integration across multiple digital environments.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations for digital media
- communications equipment and technology required for task
- workplace documentation and resources relevant to digital media
- industry software packages and apps according to task requirements.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG438 Implement and monitor advertising production

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to implement and monitor advertising production, including establishing the initial media requirements, booking advertising production and developing a monitoring report.

The unit applies to individuals in an entry-level position who are not expected to supervise the work of others but are required to have a broad knowledge of advertising media. These individuals may be responsible for media planning, media buying or advertising within an advertising team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to implement advertising production | 1.1 Confirm advertising and media requirements according to creative brief, organisational and legislative requirements 1.2 Develop media schedule 1.3 Analyse and select suppliers for production process 1.4 Seek approval from relevant stakeholders |
| 2. Implement advertising production | 2.1 Book advertising space and time 2.2 Negotiate pricing with supplier 2.3 Lodge advertisement |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|---|
| | 2.4 Report status of initial implementation to relevant stakeholders |
| 3. Monitor advertising production | 3.1 Establish and confirm post-production activities with required stakeholders 3.2 Identify and rectify issues with advertising production within scope of own responsibility 3.3 Develop monitoring report 3.4 Establish procedures for ongoing monitoring |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Numeracy | <ul style="list-style-type: none"> Uses mathematical techniques to identify cost and schedule requirements within budgetary constraints |
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information to determine and confirm advertising, media and procedural requirements |
| Writing | <ul style="list-style-type: none"> Produces clear and legible reports in required format documenting key findings |
| Teamwork | <ul style="list-style-type: none"> Applies negotiation skills to establish understanding and reach agreement Uses a range of strategies to establish connections when communicating with relevant personnel to seek and share information |
| Self-management | <ul style="list-style-type: none"> Systematically gathers and analyses all relevant information and evaluates options to decide on appropriate research strategy |
| Planning and organising | <ul style="list-style-type: none"> Determines job sequence and works logically and systematically to undertake clearly defined tasks to deadlines Uses scheduling experiences to suggest adjustment or improvement to organisational procedures |
| Problem solving | <ul style="list-style-type: none"> Recognises and takes responsibility for addressing unforeseen problems in complex work contexts |
| Technology | <ul style="list-style-type: none"> Uses digital technologies and systems to locate information, and enter data accurately Uses familiar digital technologies and systems to locate, organise and present information |

Unit Mapping Information

Supersedes and is equivalent to:

- BSBADV404 Schedule advertisements
- BSBADV408 Review advertising media options.

Supersedes but is not equivalent to:

- BSBADV402 Conduct pre-campaign testing
- BSBADV403 Monitor advertising production
- BSBADV405 Perform media calculations
- BSBADV406 Buy and monitor media
- BSBADV407 Apply media analysis and processing tools.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG438 Implement and monitor advertising production

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement and monitor the production of at least two advertisements.

In the course of the above, the candidate must:

- confirm media and selected means to advertise according to the creative brief
- apply organisational policies and procedures relevant to advertising production
- use appropriate industry technology
- organise timing and distribution of advertisements and negotiate costs with media sellers.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- industry products and services including media types and media vehicles
- legal and ethical requirements for the advertising industry
- principles of advertising and marketing mix
- organisational policies and procedures for costing and scheduling advertisements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- creative brief
- software required to implement and monitor advertising plans
- relevant organisational policies and procedures
- relevant organisational scheduling procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG439 Develop and apply knowledge of communications industry

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to research, analyse and apply knowledge of the communications industry. This includes the marketing communications industries.

The unit applies to individuals in entry-level positions who have a general knowledge of the structure, organisation and function of the communications industry. Individuals in this role may have a limited leadership and guidance responsibility to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Research and analyse communications information | 1.1 Identify and access sources of information on the communications industry 1.2 Research identified sources of information and document outcomes 1.3 Analyse the communications industry sectors, associations, networks and societal role and key stakeholders 1.4 Analyse technological developments, trends and issues of the for communication industry |
| 2. Develop | 2.1 Identify resources and task requirements for developing |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| communications deliverables | deliverables, with relevant personnel 2.2 Use research to prepare deliverable according to organisational policies and procedures 2.3 Organise information included in the communications 2.4 Establish criteria for assessing deliverable 2.5 Share deliverable to relevant personnel |
| 3. Finalise communications deliverables | 3.1 Seek feedback on deliverable from relevant personnel 3.2 Incorporate feedback to deliverable 3.3 Implement procedures for ongoing monitoring of the communications industry 3.4 Update information in the deliverable, as required |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Identifies and evaluates information from external sources to assist in clarifying and extending knowledge Uses a continuous learning approach to improve capacity to work effectively and identify and solve problems as they occur, and to address emerging opportunities and issues |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical skills to interpret data and statistical information |
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses a variety of textual information from a range of sources to identify relevant and key information |
| Writing | <ul style="list-style-type: none"> Integrates information from a number of sources to create cohesive documents using suitable format and grammatical structures, with clear, logical language suitable to the audience and purpose |
| Teamwork | <ul style="list-style-type: none"> Fosters positive relationships with others and maintains open communication |
| Self-management | <ul style="list-style-type: none"> Understands and adheres to legal and regulatory responsibilities related to own work |
| Planning and organising | <ul style="list-style-type: none"> Prioritises and completes tasks within a set timeline |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG418 Develop and apply knowledge of marketing communication industry.

Supersedes but is not equivalent to BSBPUB401 Develop and apply knowledge of public relations industry.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG439 Develop and apply knowledge of communications industry

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- research and report on the communications industry.

In the course of the above, the candidate must:

- scope the impact of new and alternative communication technology on the communications industry
- research and report on the current issues affecting the communications industry.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- current issues and trends which affect the communications industry
- employment obligations and opportunities of the communications industry
- industry structures and networks
- organisational and client operating environments, structures, and business and marketing plans
- current digital communications technologies, platforms and devices
- principles and practices of communications and media strategies
- employment obligations and opportunities
- trends including impact of technologies on the industry.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to communications industry
- communications equipment and technology
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG440 Apply marketing communication across a convergent industry

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to work effectively within the convergent industry to apply marketing communications.

The unit applies to individuals working in a variety of marketing communication roles utilising skills and knowledge from marketing, advertising, public relations and/or convergent media sectors to achieve outcomes.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish convergent environment | 1.1 Establish task requirements and objectives for implementing marketing communications 1.2 Identify roles and responsibilities within convergent industry 1.3 Identify role of the customer in the convergent environment 1.4 Identify legislation, regulations and policies applicable to convergent industry |
| 2. Prepare convergent tools and techniques | 2.1 Identify existing convergent tools and techniques in the marketing communication environment and assess their applicability 2.2 Develop convergent tools and techniques, where required, for |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|---|
| | <p>use within a marketing communication industry and for a customer-centric environment</p> <p>2.3 Confirm suitability and cost-effectiveness of the convergent tools and techniques</p> |
| 3. Implement marketing communications | <p>3.1 Select and use most suitable convergent tools and techniques according to task requirements</p> <p>3.2 Implement convergent tools and techniques for marketing communication</p> <p>3.3 Establish channels to respond to customer perspectives</p> <p>3.4 Establish and maintain expert and business networks related to marketing communication convergence</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information to establish current industry and project status from relevant information |
| Writing | <ul style="list-style-type: none"> Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience |
| Oral Communication | <ul style="list-style-type: none"> Presents information and seeks advice using language appropriate to audience |
| Numeracy | <ul style="list-style-type: none"> Identifies and interprets data from a range of sources Uses testing and data analysis to establish and test systems, monitor results and weigh costs |
| Self-management | <ul style="list-style-type: none"> Identifies and complies with organisational policies and procedures, and legislative requirements |
| Teamwork | <ul style="list-style-type: none"> Works positively with those from other disciplines to achieved desired outcomes for organisation and clients |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules complex activities, monitors implementation, and manages relevant communication Uses systematic, analytical processes in relatively complex situations, setting goals, gathering relevant information, and identifying and evaluating options; creating new tools and techniques where appropriate |
| Technology | <ul style="list-style-type: none"> Uses and manipulates digital technology to create, extend and |

| Skill | Description |
|-------|---|
| | enhance job role, products and capacity to deliver effective service design |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG417 Apply marketing communication across a convergent industry.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG440 Apply marketing communication across a convergent industry

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply marketing communication to one product or service across convergent media sectors.

In the course of the above, the candidate must:

- identify the convergent environment for marketing communication in establishing a client solution, including:
 - reviewing the traditional roles and client groups serviced by the marketing, advertising and public relations sectors
 - using the impact of capacity in communications technology
 - using the impact of ubiquitous enabled mobile devices
 - integrating the rise in ‘customer-centric’ and the ‘empowered customer’ in client solutions
- develop client and customer messaging that can be engaged by a target group across multiple distribution points
- create fit-for-purpose tools, techniques and solutions that are effective within a convergent media environment and verify with relevant personnel
- establish processes that empower customers
- work with client and customers to implement an integrated solution within a highly iterative environment
- engage with experts and others within the industry.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- characteristics of convergent approaches to marketing communication
- customers role within convergent marketing

- impact of convergence on traditional marketing approaches
- current technologies and distributed services that impact on convergent solutions
- situations requiring engagement of technology experts
- type of experts and business networks appropriate to a convergent marketing solution
- legislation, regulation and organisational policy to the field of marketing communication.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to marketing across a convergent industry
- workplace documentation and resources for marketing across a convergent industry.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG441 Develop public relations documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to design, produce and edit public relations documents for various target audiences and to evaluate their effectiveness in the marketplace.

The unit applies to individuals who usually work as part of a public relations campaign team and who analyse and evaluate information from a variety of sources. In this role, individuals use well-developed advertising skills and a broad knowledge base.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to develop public relations documents | 1.1 Identify task objectives and relevant legal and ethical frameworks 1.2 Research previous organisational public relations documents, distribution channel information and evaluation data 1.3 Confirm document objectives, message and process with relevant personnel 1.4 Identify resources, timelines and costs in consultation with relevant personnel |
| 2. Establish final public relations documents | 2.1 Draft documents according to task and organisational requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|---|
| | 2.2 Seek feedback from relevant personnel on public relations documents 2.3 Agree upon modifications and incorporate into final draft |
| 3. Review finalised documents | 3.1 Distribute documents according to timelines, task and organisational requirements 3.2 Monitor and collate feedback on the effectiveness of distributed documents 3.3 Evaluate feedback results against task objectives 3.4 Record and file evaluation results and recommendations for future improvements according to organisational policy and procedure |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses information from a range of sources Checks workplace documentation for clarity, accuracy, compliance with house style and legislative, regulatory and ethical requirements |
| Writing | <ul style="list-style-type: none"> Uses clear, accurate and relevant language to record information Develops and completes documents in a range of styles and tones suitable to different audiences and contexts |
| Oral Communication | <ul style="list-style-type: none"> Articulates information clearly using language and features appropriate to the audience Employs active listening and questioning techniques to clarify information and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical information and makes basic calculations to determine outsourcing expenditure and workplace scheduling |
| Initiative and enterprise | <ul style="list-style-type: none"> Monitors outcomes, considering results from a range of perspectives, and identifies key concepts and principles that could be improved in future situations |
| Self-management | <ul style="list-style-type: none"> Adheres to implicit and explicit organisation policies and procedures |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others as part of familiar routine activities |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks and own workload to meet timelines and achieve outcomes |

| Skill | Description |
|------------|--|
| Technology | <ul style="list-style-type: none">• Uses digital applications to record, store, retrieve and share documents |

Unit Mapping Information

Supersedes and is equivalent to BSBPUB403 Develop public relations documents.

Supersedes but is not equivalent to BSBPUB402 Develop public relations campaigns.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG441 Develop public relations documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop a minimum of two public relations documents.

In the course of the above, the candidate must:

- research content, format and processes for public relations document and confirm with relevant personnel
- develop and modify a draft public relations document according to task requirements and feedback from relevant personnel
- monitor and evaluate feedback to identify future improvements to public relations documents
- record and file results according to organisational policy and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- principles and practices of public relations
- content of public relations documents including:
 - communication objectives
 - communication messages
 - communication processes
- methods to assess effectiveness of public relations documents in fulfilling task objectives, including stakeholder feedback
- organisational requirements relevant to public relations documents
- key media and media distribution channels
- current issues and trends which affect the public relations industry
- key provisions of relevant legislation, codes of practice and national standards that affect public relations campaigns.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of public relations documents.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG442 Conduct e-marketing communications

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prepare electronic advertisements for use in internet, mobile phones and other digital media marketing communications, and to evaluate their effectiveness in achieving marketing objectives.

The unit applies to individuals working in promotional roles who are required to use electronic communications and existing business websites to effectively convey marketing communications and achieve marketing objectives in accordance with marketing or e-marketing plans.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for e-marketing | <ul style="list-style-type: none">1.1 Identify legal, ethical and organisational frameworks related to task requirements1.2 Identify existing electronic advertisement methods according to task requirements1.3 Select media for electronic advertisements according to organisation's e-marketing strategy1.4 Select e-marketing platforms for advertisement according to task requirements and organisational policy |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|---|
| 2. Perform e-marketing | 2.1 Use e-marketing platform for electronic advertisement according to e-marketing objectives 2.2 Confirm that e-marketing meets all task specifications 2.3 Present electronic advertisement on e-marketing platform to management prior to finalisation |
| 3. Evaluate use of e-marketing | 3.1 Monitor transmission of electronic advertisement and rectify errors or omissions 3.2 Evaluate e-marketing advertisements against measures of effectiveness and record outcomes according to organisational requirements 3.3 Plan for improvements to e-marketing strategies |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to individuals and to organisational requirements |
| Writing | <ul style="list-style-type: none"> Integrates information from a number of sources to develop material that supports the purposes and format of the documentation using suitable grammatical structure and clear, logical language |
| Oral Communication | <ul style="list-style-type: none"> Articulates ideas and requirements clearly and creatively based on techniques appropriate to audience and environment Elicits the view and opinions of others by listening and questioning |
| Self-management | <ul style="list-style-type: none"> Complies with organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment Takes responsibility for the outcomes of routine decisions related directly to own role |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage tasks with an awareness of how they may contribute to longer term operational and strategic goals Identifies and explicitly applies some basic principles of analytical and lateral thinking |

| Skill | Description |
|-----------------|--|
| Problem solving | <ul style="list-style-type: none">Identifies and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts |
| Technology | <ul style="list-style-type: none">Identifies key purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete routine tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG412 Conduct e-marketing communications.

Supersedes but is not equivalent to BSBCUE303 Conduct a telemarketing campaign.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG442 Conduct e-marketing communications

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare communications for at least two products or services to promote on an e-marketing platform.

In the course of the above, the candidate must:

- finalise communication with management according to organisational marketing strategy and objectives
- review communication and record according to organisational policies and procedures
- assess effectiveness of advertisement and plan for improvements to e-marketing strategies according to task objectives.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, codes of practice and national standards that affect marketing operations
- industry products and services knowledge
- intellectual property requirements
- organisational structure, roles and responsibilities
- principles of marketing and advertising
- software applications used in conducting electronic advertising and marketing.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes for e-marketing
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG541 Identify and evaluate marketing opportunities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify, evaluate and take advantage of marketing opportunities by analysing market data, distinguishing characteristics of possible markets and assessing viability of changes to operations.

The unit applies to individuals working in a supervisory or management marketing or advertising role within a marketing or advertising team or media organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Explore marketing opportunities | 1.1 Analyse information on market and business needs for marketing opportunities 1.2 Identify potential new markets 1.3 Apply innovative approaches relevant to the development of potential marketing opportunities |
| 2. Evaluate marketing opportunities | 2.1 Identify and analyse opportunities for organisational fit according to organisational goals and capabilities 2.2 Analyse the viability of each opportunity 2.3 Determine probable return on investment and potential competitors 2.4 Select marketing opportunities according to outcomes of |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | viability analysis, return on investment and competition |
| 3. Evaluate required changes to current operations | 3.1 Seek feedback from relevant stakeholders 3.2 Incorporate feedback received for current operations and take advantage of viable marketing opportunities 3.3 Review current operations and document changes needed 3.4 Identify resource requirements for marketing opportunities 3.5 Document and communicate viability of marketing opportunities to key stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Evaluates and comprehends textual information from a range of sources and draws own conclusions |
| Writing | <ul style="list-style-type: none"> Integrates information from a number of sources to develop material that supports purposes of documentation using suitable grammatical structure and clear, logical language |
| Oral Communication | <ul style="list-style-type: none"> Presents opinions, ideas and organisational requirements clearly and creatively using language and presentation techniques appropriate to audience and environment Elicits views and opinions of others by listening and questioning |
| Numeracy | <ul style="list-style-type: none"> Evaluates financial and marketing data using whole numbers, decimals and percentages to make accurate calculations |
| Initiative and enterprise | <ul style="list-style-type: none"> Evaluates outcomes of decisions to identify opportunities for improvement Develops new and innovative ideas through exploration, analysis and critical thinking |
| Self-management | <ul style="list-style-type: none"> Identifies and follows explicit and implicit organisational protocols and meets expectations associated with own role |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage relatively complex tasks with an awareness of how they may contribute to longer-term operational and strategic goals Makes decisions by systematically analysing information, identifying and evaluating options against set criteria, and choosing most appropriate option |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG501 Identify and evaluate marketing opportunities.

Supersedes but is not equivalent to:

- BSBMKG518 Plan and implement services marketing
- BSBMKG519 Plan and implement business-to-business marketing
- BSBMKG521 Plan and implement sponsorship and event marketing.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG541 Identify and evaluate marketing opportunities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify and evaluate at least three marketing opportunities.

In the course of the above, the candidate must:

- comply with organisational policies and procedures
- communicate and document potential of identified marketing opportunity to relevant stakeholders.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- how to calculate the financial viability of marketing opportunities
- return on investment
- financial and marketing data
- organisational structure, products and services
- principles of marketing and marketing mix
- statistical methods and techniques to evaluate marketing opportunities, including forecasting techniques.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes for marketing

- workplace marketing documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG542 Establish and monitor the marketing mix

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify and establish an effective marketing mix for a business. It includes preparing, implementing and monitoring the market mix.

The unit applies to individuals who have management roles in marketing and are responsible for developing marketing and promotional mix within an organisation. These individuals may monitor the marketing mix to adjust according to new marketing opportunities identified.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare marketing mix | 1.1 Identify task requirements 1.2 Analyse effects of pricing policy, promotional methods and channels of distribution on marketing outcomes 1.3 Identify potential customer base and key pressure points 1.4 Test effects of components of marketing mix on each other and relative importance to customer base 1.5 Select suitable marketing mix |
| 2. Implement marketing mix | 2.1 Identify required resources 2.2 Brief stakeholders of roles and responsibilities in |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------|--|
| | implementation 2.3 Establish communication and team building strategies 2.4 Establish strategies for monitoring the marketing activities |
| 3. Monitor marketing mix | 3.1 Assess marketing performance against targets for task objectives 3.2 Compare and record variances in marketing revenue and costs against budget 3.3 Prepare and present marketing reports indicating ongoing progress towards marketing objectives |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Evaluates financial and marketing data using whole numbers, decimals and percentages to make accurate calculations |
| Reading | <ul style="list-style-type: none"> Evaluates and comprehends textual information from a range of sources |
| Writing | <ul style="list-style-type: none"> Documents results of analysis of marketing mix Presents analysis results in required format |
| Problem solving | <ul style="list-style-type: none"> When dealing with complex issues identifies cause of the problem, and uses analytical processes to generate possible solutions |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage relatively complex tasks with an awareness of how they may contribute to longer-term operational and strategic goals |
| Self-management | <ul style="list-style-type: none"> Makes decisions by systematically analysing information, identifying and evaluating options against set criteria, and choosing most appropriate option Evaluates outcomes of decisions to identify any required adjustments |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG502 Establish and adjust the marketing mix.

Supersedes but is not equivalent to:

- BSBMKG514 Implement and monitor marketing activities
- BSBMKG529 Manage client account.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG542 Establish and monitor the marketing mix

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- establish and monitor the marketing mix for an organisation or work area, including:
 - reporting on activities undertaken to establish marketing mix in organisation
 - reporting information on each element of marketing mix, including:
 - customer service levels
 - distribution
 - pricing
 - promotion.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies, procedures, products and services related to marketing
- principles and concepts of marketing, including consumer and buyer behaviour
- elements of marketing mix
- methods to gather and analyse marketing information, including variances in marketing revenue and costs.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations and codes relevant to marketing mix
- organisational and marketing strategic plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG543 Plan and interpret market research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan market research and conduct an analysis to report and interpret findings.

The unit applies to individuals who conduct market research planning at a managerial level. These individuals may have a good general knowledge of market research as well as a detailed understanding of the organisation's operations, objectives and application.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan market research | 1.1 Identify market research objectives and requirements 1.2 Identify and select data collection methods 1.3 Develop market research plan |
| 2. Perform market research | 2.1 Obtain approval from relevant personnel to undertake market research 2.2 Conduct research according to market research plan developed 2.3 Collate and document research |
| 3. Assess results of market research | 3.1 Analyse data obtained from market research using statistical and qualitative techniques 3.2 Forecast existing and emerging market needs based on the |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|---|
| | market research 3.3 Identify threats and opportunities for future marketing activity |
| 4. Report on market research | 4.1 Interpret and prepare data for presentation 4.2 Review presentation and rectify errors, where required 4.3 Present research findings to relevant stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-----------------|--|
| Numeracy | <ul style="list-style-type: none"> Collects, organises and analyses data to draw conclusions or make forecasts about trends and probability Uses analysis techniques |
| Reading | <ul style="list-style-type: none"> Researches, evaluates, analyses and interprets market information from a range of sources, and interprets requirements |
| Writing | <ul style="list-style-type: none"> Prepares reports containing complex ideas and concepts and writes in a range of styles to suit different audiences |
| Problem solving | <ul style="list-style-type: none"> Develops plans and uses effective organisational and time management skills to complete tasks Applies systematic and analytical decision making processes in complex and non-routine situations |
| Technology | <ul style="list-style-type: none"> Uses digital technologies and systems to enter and analyse data and to present information |

Unit Mapping Information

Supersedes and is equivalent to:

- BSBMKG506 Plan market research
- BSBMKG507 Interpret market trends and developments.

Supersedes but is not equivalent to BSBMKG528 Mine data to identify industry directions.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG543 Plan and interpret market research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan and interpret market research for one product or service.

In the course of the above, the candidate must:

- identify market research objectives, requirements, data collection methods
- develop a marketing research plan
- research and collate market findings
- obtain required approvals
- apply analysis techniques to identify:
 - potential threats and opportunities
 - existing and emerging market needs
- document the analysis of market research and present findings.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- internal and external sources of information relevant to forecasting market trends including:
 - business and strategic objectives
 - comparative market information
 - changes in technology
 - industry trends
 - social, cultural and economic trends
 - political activity and legislative changes
- content and development of market research plan
- software applications that are commonly used in quantitative and qualitative analysis

- codes of practice and conduct relevant to marketing
- market research principles and practices including:
 - project design according to timelines and budget requirements
 - development and use of hypothesis
 - role of research in enterprise development
- statistical concepts, methods, techniques and reporting formulas commonly used in market research including:
 - conversion rates of leads to sales
 - measures of central tendency
 - measures of statistical dispersion
 - nature and degree of relationship between variables
 - net response rate
 - normal distribution probability curve
 - sampling
 - recency or frequency grids
 - lifetime value of customers
 - net present value of customers.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to market research
- workplace documentation and resources for market research.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG544 Plan and monitor direct marketing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan and monitor direct marketing activities for specific services and products.

The unit applies to individuals who are responsible for attracting a brand's target audience to increase brand involvement. Individuals work across a variety of industries and possess a sound theoretical knowledge base. They demonstrate a range of managerial skills to ensure business activities are conducted effectively and comply with legislative requirements.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish direct marketing activities | 1.1 Identify marketing objectives and goals. 1.2 Research and select direct marketing activities according to marketing objectives 1.3 Create budget and timeline for selected direct marketing activities 1.4 Produce a direct marketing activities proposal 1.5 Present direct marketing activities proposal to relevant personnel 1.6 Develop indicators for evaluating direct marketing activities |
| 2. Implement direct | 2.1 Initiate negotiations with relevant stakeholders and proceed |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| marketing activities according to legislative requirements | with selected direct marketing activities 2.2 Assist in drafting contracts for direct marketing activities according to negotiation outcomes 2.3 Assemble resources to implement direct marketing activities according to direct marketing activities proposal, negotiation outcomes and legislative requirements 2.4 Brief staff on their required input to direct marketing activities |
| 3. Evaluate direct marketing activities | 3.1 Calculate effectiveness of direct marketing activities using indicators 3.2 Recommend modifications to direct marketing activities according to evaluation performed 3.3 Record improvement opportunities for future marketing opportunities |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Oral communication | <ul style="list-style-type: none">Participates in verbal exchanges using appropriate language and non-verbal featuresUses active listening and questioning to confirm understanding |
| Reading | <ul style="list-style-type: none">Identifies and analyses complex text to identify marketing opportunities |
| Writing | <ul style="list-style-type: none">Prepares detailed documentation using appropriate terminology and format to convey clear messages to team members and relevant stakeholders |

Unit Mapping Information

Supersedes and is equivalent to:

- BSBMKG508 Plan direct marketing activities
- BSBMKG509 Implement and monitor direct marketing activities.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG544 Plan and monitor direct marketing activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan and monitor a direct marketing activities for a product or service.

In the course of the above, the candidate must:

- research, select and create budget for direct marketing activities
- plan timelines for implementation and continuation of direct marketing activities
- develop direct marketing activity proposal
- present proposal to relevant personnel according to organisational policies and procedures
- negotiate and draft contracts for direct marketing activities in consultation with relevant personnel
- recommend and record improvements to future marketing activities.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- types of direct marketing activities
- target audience outcomes from direct marketing activities
- content of a proposal for direct marketing activities including:
 - objectives and purpose of marketing strategy
 - detailed budget
 - timelines
 - implementation plan
 - performance indicators
- development of a proposal for direct marketing activities
- negotiation strategies
- methods of evaluating effectiveness of direct marketing activities

- sources of advice available on contract requirements for direct marketing activities.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents and data on direct marketing activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG545 Conduct marketing audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to conduct marketing audits, with reference to an organisation's marketing plan.

The unit applies to individuals who are required to develop a comprehensive description of the organisation's marketing operations as part of the marketing, planning and marketing auditing process. The outcomes of marketing audits are generally used to inform an organisation's marketing plan. In this role, individuals must possess a sound theoretical knowledge of advertising management and demonstrate a range of managerial skills. Typically, they have responsibility for the work of other staff.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for marketing audit | 1.1 Identify objectives of marketing audit according to organisational marketing plan 1.2 Identify scope of marketing audit and audit methodology according to organisational marketing plan 1.3 Identify participants required for marketing audit process |
| 2. Identify form of marketing audit | 2.1 Identify characteristics of marketing audit according to task requirements and audit priorities 2.2 Identify elements to be included in marketing audit and its |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | format according to organisational requirements 2.3 Identify and select marketing audit according to organisational marketing plan |
| 3. Establish external marketing audit | 3.1 Identify external environmental factors that meet requirements of audit process 3.2 Identify technological factors, market characteristics and competitive factors relating to the business, which meet audit process requirements 3.3 Perform external marketing audit |
| 4. Establish internal marketing (self) audit | 4.1 Identify criteria to use in an internal marketing audit according to organisational requirements 4.2 Identify marketing productivity according to profitability and cost effectiveness 4.3 Record results according to organisational and audit requirements |
| 5. Prepare marketing audit report | 5.1 Develop a marketing audit report according to organisational requirements 5.2 Confirm marketing audit report meets reporting requirements of marketing audit form selected and marketing plan 5.3 Confirm accuracy of marketing audit report with relevant personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and evaluates complex textual information when auditing workplace documentation |
| Writing | <ul style="list-style-type: none"> Uses clear, accurate and relevant language to organise and record information using suitable organisational formats |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using appropriate language and non-verbal features |
| Numeracy | <ul style="list-style-type: none"> Makes basic calculations from numerical data to audit external marketing, quantify data and determine financial gains |
| Problem solving | <ul style="list-style-type: none"> Identifies cause of the problem, and uses analytical processes to generate possible solutions when dealing with complex issues |

| Skill | Description |
|-------------------------|---|
| Self-management | <ul style="list-style-type: none">Complies with organisational policies and objectives, and considers own role for its contribution to broader goals of work environment |
| Planning and organising | <ul style="list-style-type: none">Develops plans and uses effective time management and organisational skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goalsUses formal decision-making processes to gather information, identify and evaluate several choices against a set of criteria in complex, non-routine situations |
| Technology | <ul style="list-style-type: none">Identifies and uses a range of relevant digital language and symbols |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG515 Conduct a marketing audit.

Supersedes but is not equivalent to:

- BSBMKG520 Manage compliance within the marketing legislative framework
- BSBMKG522 Plan measurement of marketing effectiveness.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG545 Conduct marketing audits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- conduct at least two marketing audits.

In the course of the above, the candidate must:

- identify the objectives, scope and relevant personnel involved in marketing audit
- identify elements and form of marketing audit according to task requirements and audit priorities
- establish internal and external marketing audits
- develop and confirm marketing audit report with relevant personnel.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational and audit requirements
- scheduling of a marketing audit and considerations of organisational requirements
- organisational marketing plans
- research methodologies and data collection techniques appropriate to marketing audits
- different types of marketing audits.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- documentation and resources used to conduct marketing audit activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG546 Develop social media engagement plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to effectively develop social media engagement plans with a preferred target audience.

The unit applies to individuals working in a variety of marketing and communications occupational roles who have responsibility for developing social media plans and facilitating social engagement on behalf of a business or organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to develop social media strategy | <ul style="list-style-type: none">1.1 Identify client requirements and characteristics of target audience for social media strategy1.2 Research and document characteristics and online habits of the target audience according to organisational policy1.3 Identify and analyse common responses to triggers, interventions, and preferred and avoided behaviours on social media platforms and applications1.4 Evaluate market research and identify the attention span and retention characteristics of alternative content types and engagement patterns1.5 Document research results and deliver to appropriate personnel |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| 2. Devise social media engagement strategy | 2.1 Select preferred social media platforms and applications according to organisation, client and audience requirements 2.2 Select content and engagement interventions for target audience according to client requirements 2.3 Establish metrics for social media performance according to organisational strategies 2.4 Identify and develop mitigation solution for risks to brand and message integrity and trust of target audience |
| 3. Facilitate content delivery | 3.1 Develop relevant content and schedule release for maximising target audience attention 3.2 Engage with target audience on chosen social media platforms 3.3 Identify and implement relevant tools and automate the engagement process in applicable delivery areas 3.4 Apply identified metrics for posts, responses and updates |
| 4. Monitor and evaluate social media engagement | 4.1 Develop plan for ongoing review of performance using a social media analytics service 4.2 Identify gaps in performance against requirements and adjust as necessary according to organisational plan 4.3 Evaluate and report on social media engagement effectiveness for delivery to relevant personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and analyses complex texts to determine organisational and client requirements Reviews relevant information to understand the audience of the social media engagement |
| Writing | <ul style="list-style-type: none"> Integrates information from a number of sources to develop materials suitable for purpose and audience |
| Oral Communication | <ul style="list-style-type: none"> Presents information and seeks input using structure and language appropriate to audience Uses questioning and listening to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Analyses data from a range of sources to effectively understand audience, and define strategy success |
| Initiative and | <ul style="list-style-type: none"> Draws insights from information, enabling increased understanding |

| Skill | Description |
|-------------------------|---|
| enterprise | within the organisation and opportunities for improvement |
| Self-management | <ul style="list-style-type: none">Adheres to and job requirements relevant to social media engagementResponds rapidly and shows flexibility by taking advantage of the organic nature of social media where it is advantageous for organisation and client |
| Planning and organising | <ul style="list-style-type: none">Plans and organises workload and processes to ensure compliance with organisational policies and procedures |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG537 Develop a social media engagement plan.

Supersedes but is not equivalent to:

- BSBMKG534 Design effective digital user experiences
- BSBMKG535 Devise a search engine optimisation strategy.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG546 Develop social media engagement plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, review and update a social media engagement plan for an organisation or work area.

In the course of the above, the candidate must:

- specify a target audience for social media engagement according to client or organisational requirements
- set measurable metrics for determining success
- research online behaviours and characteristics of target audience and identify typical responses and journeys
- review and select social media platforms and applications to meet requirements
- develop and schedule release of relevant content that aligns to strategy
- develop a plan for social media interactions including requirements for consistent messaging and automate engagement process where possible
- monitor and react positively to changes in the social media space.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- features of existing legislation and policy relevant to social media
- qualitative and quantitative terms to describe:
 - external environmental factors which meet requirements of audit process
 - technological factors
 - market characteristics and competitive factors relating to or affecting the business
 - which meet audit process requirements
- features of existing social media platforms and their relevance to key industry functions

- benefits of consistent messaging in social media, including branding and the development of trust
- methods of engaging target audience on social media including:
 - offering personalised responses to target audience questions
 - comments
 - reactions
- typical response characteristics of users to common social media interventions
- features of existing tools and techniques used to engage users on social media
- performance measures commonly used to evaluate social media engagement
- relevant organisational strategies, policies, and procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations for business social media engagement
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG547 Develop strategies to monetise digital engagement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to monetise digital engagement through a focus on customer engagement, content relevance and real-time digital payment systems.

The unit applies to individuals working in a variety of marketing and communications occupational roles who have responsibility for working with clients (both internal and external) on improving income streams from their digital strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish the monetisation of digital engagement | 1.1 Identify task requirements and applicable legal, organisational and financial frameworks 1.2 Prepare criterion for channel monetisation according to organisational marketing strategies 1.3 Research opportunities for paid, owned or earned customer engagement 1.4 Select channel for monetisation |
| 2. Create design interventions | 2.1 Analyse digital processes for reliability and customer trust 2.2 Use authentication and security requirements for securing transactions according to organisational policies and procedures 2.3 Model the digital customer engagement to select points-of-sale |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | and closure according to organisational strategies |
| 3. Select and implement tools and technologies | 3.1 Negotiate processing parameters with relevant stakeholders according to task requirements and organisational strategies 3.2 Evaluate and select payment processing tools and technologies 3.3 Identify and evaluate reliability of systems for the collection and analysis of transaction data |
| 4. Monitor and evaluate performance | 4.1 Conduct review of performance with financial analytics service according to organisational strategies 4.2 Track transaction metrics using suitable technologies 4.3 Monitor and identify gaps in performance against requirements and adjust as necessary 4.4 Evaluate and report on monetisation effectiveness to relevant personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and analyses complex texts to determine legislative, regulatory and business requirements Reviews reported information to evaluate workplace strategies and improvement practices |
| Writing | <ul style="list-style-type: none"> Researches, plans and prepares documentation using format and language appropriate to context and audience, as well as legislative and organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Presents information and seeks advice using language appropriate to audience and context |
| Numeracy | <ul style="list-style-type: none"> Interprets and analyses data from a range of sources Analyses data to inform implementation decisions and reviews on appropriateness, effectiveness and cost |
| Self-management | <ul style="list-style-type: none"> Identifies and follows legislative requirements and organisational policies and procedures associated with own role |
| Problem solving | <ul style="list-style-type: none"> Anticipates problems, taking steps to solve them; and evaluates outcomes of decisions to identify opportunities for improvement |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal stakeholders, external service providers |

| Skill | Description |
|-------------------------|---|
| | and clients to seek or share information |
| Planning and organising | <ul style="list-style-type: none">Plans, organises and implements work activities that ensure compliance with organisational policies and procedures, and legislative requirementsUses systematic, analytical processes in relatively complex situations, setting goals, gathering relevant information, and identifying and evaluating options and outcomes against agreed criteria |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG536 Develop strategies to monetise digital engagement.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG547 Develop strategies to monetise digital engagement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least one strategy to monetise digital engagement.

In the course the above, the candidate must:

- analyse digital engagement channels and identify and evaluate the opportunities to monetise digital engagement
- devise measurable success criteria for monetised transactions
- design a model of customer engagement showing preferred points-of-sale and closure
- describe how digital authentication and security works to develop customer trust
- evaluate, negotiate and enter into service agreements
- identify, document and present trends and performance information from transaction data.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- differences between paid, owned and earned customer engagement
- barriers to streamlined transactions for digital users
- features of digital applications required to enable transactions
- engagement features of common digital financial transaction systems
- features of current payment processing tools and technologies used in digital transactions
- financial services legislation that impact on digital financial transactions
- organisational strategies, policies and procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to monetising engagements for businesses
- software and technology for monetising engagements for businesses
- workplace documentation and resources including policies and procedures for strategy development and business engagements.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG548 Forecast international market and business needs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to forecast, evaluate and draw insights from international market intelligence to promote business development.

The unit applies to individuals who with a considerable understanding of international business management and possess the managerial and supervisory skills to facilitate the effective functioning of business activities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare market intelligence | 1.1 Identify task objectives and target market 1.2 Apply forecasting technique to Australian and international markets and identify trends and developments 1.3 Collate and record information according to organisational objectives |
| 2. Evaluate information | 2.1 Identify organisational business capabilities and resources 2.2 Analyse international market information 2.3 Identify threats and opportunities for business development according to forecasting results |
| 3. Establish | 3.1 Identify potential organisational changes according to |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------|--|
| recommendations | forecasting results 3.2 Prepare recommendations according to task requirements 3.3 Discuss recommendations with relevant personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Numeracy | <ul style="list-style-type: none">Analyses and interprets complex business data to track strengths and weaknesses and to forecast trends |
| Reading | <ul style="list-style-type: none">Identifies, analyses and compares complex textual information to interpret market developments and opportunities |
| Writing | <ul style="list-style-type: none">Produces complex reports forecasting market and business needs, using clear and well organised graphical and textual information |
| Planning and organising | <ul style="list-style-type: none">Develops plans and uses effective organisational skills to complete tasks with an awareness of how they may contribute to longer term operational and strategic goalsUses systematic and analytical decision-making processes to gather and evaluate data in complex non-routine situations |
| Technology | <ul style="list-style-type: none">Uses a range of digital applications to access and filter data, extract, organise, integrate and share relevant information |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG512 Forecast international market and business needs.

Supersedes but is not equivalent to:

- BSBINT405 Apply knowledge of import and export international conventions, laws and finance
- BSBMKG511 Analyse data from international markets.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG548 Forecast international market and business needs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- forecast and evaluate an international market on at least one occasion, and forecast and evaluate business needs.

In the course of the above, the candidate must:

- comply with organisational policies and procedures
- develop and discuss recommendations to improve business with relevant personnel.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- forecasting techniques including:
 - bottom-up forecasting
 - delphi techniques
 - model building
 - projection
 - scenario planning
 - intention surveys
 - top-down forecasting
- sources of information relevant to forecasting international market and business needs including:
 - core activities, customer base, business value sand current business direction
 - marketing and other business performance
 - comparative market information
 - changes in technology
 - demographic changes

- political events
- social and cultural factors
- economic trends
- government activities and legislative changes
- industry trends
- impacts of international market performance on internal business operations
- legislative and regulatory context of organisation in relation to forecasting market and business needs
- organisational information for forecasting international market and business needs including core activities and capabilities
- software commonly used in marketing forecasting and analysis.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes related to forecasting international marketing needs
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG549 Profile and analyse consumer behaviour for international markets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to profile and analyse consumer behaviours for a range of international markets.

The unit applies to individuals who have managerial responsibility for selecting and confirming appropriate international markets by identifying target markets, analysing customer behaviour and recommending strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to profile | 1.1 Identify task objectives and international target markets 1.2 Review past marketing plans, strategies, campaigns and positioning of products and services, where possible 1.3 Identify and select targeting strategy according to task and organisational requirements 1.4 Develop consumer profile for the selected market 1.5 Develop positioning strategy |
| 2. Analyse consumer behaviours | 2.1 Research consumer behaviours for target international markets 2.2 Analyse consumer needs and interest in target international |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|---|
| | markets 2.3 Assess individual, social, cultural, lifestyle influences on consumer behaviour |
| 3. Develop and recommend strategies | 3.1 Determine strategies for profiling and analysing consumer behaviours 3.2 Seek areas for improvement to developed strategy in consultation with relevant personnel 3.3 Present strategy to relevant stakeholders for feedback according to task requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Interprets trends to inform understanding of consumer needs Performs calculations to ensure plans meet budgetary requirements |
| Oral communication | <ul style="list-style-type: none"> Presents information using language and features appropriate to the context and audience |
| Reading | <ul style="list-style-type: none"> Identifies and analyses complex texts to assess consumer behaviour and determine legislative requirements |
| Writing | <ul style="list-style-type: none"> Produces comprehensive rationale using language and structure appropriate to context and audience |
| Self-management | <ul style="list-style-type: none"> Adheres to organisational objectives, policies and requirements Considers own role in terms of its contribution to broader goals of work environment |
| Planning and organising | <ul style="list-style-type: none"> Uses effective organisational skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals Uses analytical processes to gather and access information required to decide on most appropriate marketing strategies |
| Technology | <ul style="list-style-type: none"> Uses digital tools to gather and analyse data about consumer behaviours |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBMKG516 Profile international markets
- BSBMKG517 Analyse consumer behaviour for specific international markets.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG549 Profile and analyse consumer behaviour for international markets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- profile and analyse consumer behaviour for at least two international markets according to organisational objectives.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- cultural aspects relevant to international markets profiled
- consumer profile content including consumer characteristics in standard statistical terms
- market profiling techniques and related software programs
- influence on consumer behaviour, including:
 - individual
 - social
 - cultural
 - lifestyle
- key provisions of relevant legislation affecting consumer behaviours for products and services including:
 - Trade Practices Act
 - World Trade Organisation
 - Privacy Act
- sources of information on international markets
- segment descriptors to define international target markets.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards for markets for international markets
- examples of plans, strategies and campaigns.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG550 Promote products and services to international markets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to promote products and services to international markets in line with the organisational marketing plan and strategy for a specified target market.

The unit applies to individuals who have a managerial-level responsibility for promoting products and services to international markets. This includes planning, coordinating and reviewing of promotional activities. These individuals use well-developed problem-solving skills to create solutions to unpredictable problems through analysis and evaluation of information from a variety of sources.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan promotion | 1.1 Identify and confirm task objectives and requirements, budget timeline, and target market with relevant stakeholders 1.2 Access relevant information for assistance in planning 1.3 Develop a potential range of promotional activities for international target market according to regulatory and organisational guidelines, international requirements and promotional plans |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------|---|
| | 1.4 Select activities according to task requirements 1.5 Document selected promotional activities for approval for implementation |
| 2. Coordinate promotion | 2.1 Identify and prepare personnel and resources for implementation of promotional activity 2.2 Implement marketing activity according to legal, regulatory and organisational requirements 2.3 Assign responsibilities for ongoing evaluation of promotional activity 2.4 Monitor and address variations between expected and actual performance of promotion according to marketing objectives and organisational policy |
| 3. Review promotion | 3.1 Gather feedback on marketing mix for improvements in target and outcomes 3.2 Analyse promotional outcomes against costs and timelines 3.3 Identify process improvements for future international marketing opportunities 3.4 Prepare recommendations for future direction of internationally based promotional activities |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-----------------|--|
| Numeracy | <ul style="list-style-type: none"> Collates and interprets numeric information to analyse trend data, targets and resource requirements |
| Reading | <ul style="list-style-type: none"> Interprets textual information obtained from a range of sources and determines how content may be applied to organisational requirement |
| Writing | <ul style="list-style-type: none"> Communicates with others using clear and detailed language to request specific information and brief relevant personnel Integrates information from a number of sources to develop material that supports purposes and format of documentation using suitable grammatical structure and clear, logical language |
| Self-management | <ul style="list-style-type: none"> Takes personal responsibility for adherence to legal and regulatory responsibilities relevant in own work context Identifies and follows explicit and implicit protocols and meets expectations associated with own role |

| Skill | Description |
|-------------------------|---|
| | <ul style="list-style-type: none">Identifies and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts |
| Planning and organising | <ul style="list-style-type: none">Develops plans to manage tasks with an awareness of how they may contribute to longer-term operational and strategic goals |
| Technology | <ul style="list-style-type: none">Uses a range of digital applications to access data, extract, organise, and integrate relevant information |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG513 Promote products and services to international markets.

Supersedes but is not equivalent to BSBMKG416 Market goods and services internationally.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG550 Promote products and services to international markets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- promote at least two products and services to international markets.

In the course of the above, the candidate must:

- research, prepare and document culturally appropriate promotional activities
- manage resources
- monitor and address issues in promotion according to marketing objectives and organisational policy
- review and analyse promotional activity
- develop recommendations to improve internationally based promotional activities.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of legislation, codes of practice and standards affecting international market promotion opportunities
- promotional activities relevant to international markets
- key features of target international market including:
 - cultural social, economic, political factors affecting marketing opportunity
 - media channels available
 - legislative requirements
- strategies for building and maintaining client relationships
- national, bilateral or regional trade agreements
- World Trade Organisation rules
- marketing concepts, principles and strategies
- evaluation principles and strategies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- organisational policies for promoting products and services to international markets
- legislation applicable to promotion of products and services for international markets.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG551 Create multiplatform advertisements for mass media

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to create multiplatform advertisements for the communication of a product, service or idea to consumers.

The unit applies to individuals who work in supervisory management roles within an advertising team or media organisation and are primarily responsible for the development of advertisements.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify requirements for multiplatform advertising | 1.1 Identify and Confirm task objectives and requirements with client 1.2 Establish timeline, target audience and budget for multiplatform advertisements for mass media |
| 2. Develop multiplatform advertisement | 2.1 Select advertising platforms according to task objectives 2.2 Prepare multiplatform advertisements for mass media according to task objectives, client and platform specifications 2.3 Present advertisement to client for confirmation 2.4 Implement advertisement on platform according to platform |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|--|
| | specifications in consultation with client |
| 3. Review multiplatform advertisement | 3.1 Seek feedback on advertisement from client 3.2 Analyse feedback to identify areas for improvement 3.3 Document key learnings according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Learning | <ul style="list-style-type: none">Identify and interpret a range of textual information to ensure client requirements and legal and ethical requirements are met |
| Numeracy | <ul style="list-style-type: none">Interprets budgetary and scheduling information |
| Writing | <ul style="list-style-type: none">Records explicit information and develops effective messages for a variety of audiences and purposes |
| Self-management | <ul style="list-style-type: none">Takes full responsibility for adherence to legislative and ethical requirements |
| Planning and organising | <ul style="list-style-type: none">Works independently and collectively to make range of aesthetic and technical decisions meeting creative, legislative and ethical requirements |
| Technology | <ul style="list-style-type: none">Identifies purposes, specific functions and key features of common digital systems and tools, and operates them effectively to produce digital media |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBADV503 Coordinate advertising research
- BSBADV509 Create mass print media advertisements
- BSBADV510 Create mass electronic media advertisements
- BSBADV603 Manage advertising production
- BSBMKG530 Create distributed multiplatform digital advertisements.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG551 Create multiplatform advertisements for mass media

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- create at least three advertisements for multi-platform advertising.

In the course of the above, the candidate must:

- adhere to time, schedule, budget and legal requirements
- evaluate multiplatform advertisements and identify and document areas for improvement.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- industry, services, products and organisation
- purposes and principles of advertising
- principles of consumer behaviour
- content and development requirements for specific advertising platform
- provisions of legislation, codes of practice and standards affecting advertising
- legal and ethical principles relevant to advertising industry timelines, budget and resources requirements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and codes of practice relevant to creating multiplatform advertisements
- organisational policies and procedures for developing advertisements
- industry software and technology for developing advertisements

- creative briefs.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG552 Design and develop marketing communication plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify and evaluate a range of marketing communication mediums to design and develop marketing communication plans.

The unit applies to individuals who work in advertising, public relations, marketing or other promotional roles who plan electronic communications to effectively convey marketing communication messages and support achievement of marketing objectives.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare marketing communication plan information | 1.1 Identify and confirm marketing communication purpose and objectives, expectations, budget, timeline and target audience with client 1.2 Obtain client and product information |
| 2. Design marketing communication plan | 2.1 Undertake and document research according to task requirements 2.2 Communicate outcomes and findings to relevant stakeholders 2.3 Identify marketing communications mix options 2.4 Compare advantages and disadvantages of communications |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | mix 2.5 Select communication mix according to marketing communication brief 2.6 Establish success measures for marketing communication plan |
| 3. Finalise marketing communication plan | 3.1 Prepare budget and timeline proposal 3.2 Present marketing communication plan to client 3.3 Seek feedback from relevant stakeholders on communication plan 3.4 Make changed to the communications plan according to feedback received |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Numeracy | <ul style="list-style-type: none"> Collates and interprets numeric data to analyse trends data, develop targets and prepare budgets for marketing activities |
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates complex texts to determine requirements of advertising brief, legislative, regulatory and business requirements |
| Initiative and enterprise | <ul style="list-style-type: none"> Develops new and innovative ideas through exploration, analysis and critical thinking |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for following implicit and explicit voluntary constraints related to budget, legal and ethical requirements in development of marketing communication plan Plans, organises and implements tasks to achieve outcomes with an awareness of client requirements, time and budgetary constraints |
| Technology | <ul style="list-style-type: none"> Uses digital technologies to enter data, organise and present information |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG523 Design and develop an integrated marketing communication plan.

Supersedes but is not equivalent to:

- BSBADV507 Develop a media plan
- BSBMKG510 Plan e-marketing communications.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG552 Design and develop marketing communication plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- design and develop at least one marketing communication plan.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relevant to marketing communication plans
- key features of marketing communications plans
- content and format of marketing communication plans including:
 - purpose statement
 - definition of target audience
 - analysis of product or service
 - legal and ethical constraints
 - marketing communication functions and media vehicles
- procedures for developing budget proposals.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations and codes of practice for marketing communications plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG553 Develop public relations campaigns

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop multifaceted and potentially ongoing public relations campaigns.

The unit applies to individuals working in senior roles, who possess sound theoretical business skills and knowledge and who often have substantial experience. These individuals are also seeking to further develop their skills across a wide range of business functions.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Interpret a complex public relations campaign brief | 1.1 Identify objective of a complex public relations campaign brief 1.2 Identify campaign's messages, strategies, roles and responsibilities, resource requirements, and client requirements 1.3 Identify legal and ethical constraints in the brief |
| 2. Identify and evaluate options for a complex public relations campaign | 2.1 Analyse information about the target public and their attributes, and the public relations environment 2.2 Identify and evaluate a range of options for message concepts 2.3 Identify and select media according to target public and campaign objectives 2.4 Consult media directories and confirm suitable journalists and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | <p>personnel are selected for campaign</p> <p>2.5 Identify requirements for external suppliers and contract resources according to task requirements</p> |
| 3. Prepare public relations campaign plans | <p>3.1 Plan and document a complex public relations campaign and its approach according to client requirements</p> <p>3.2 Identify and incorporate budget, timing and schedules</p> <p>3.3 Identify potential sources of risk</p> <p>3.4 Develop and document control mechanisms</p> <p>3.5 Finalise plan and present document to relevant stakeholders</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets, analyses and synthesises complex information from various sources |
| Writing | <ul style="list-style-type: none"> Uses clear, engaging and persuasive language to produce documentation in a range of styles for different audiences and contexts |
| Oral Communication | <ul style="list-style-type: none"> Clearly articulates instructions and information using appropriate language and features for various audiences Employs listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical formula to calculate whole numbers and decimals to determine work schedules and budgetary requirements |
| Self-management | <ul style="list-style-type: none"> Complies with organisational, legal and ethical requirements relevant to own role |
| Teamwork | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role Collaborates with others to negotiate agreement on plans |
| Planning and organising | <ul style="list-style-type: none"> Prioritises and sequences work plans to ensure work deadlines are met Analyses options to make decisions related to campaign Anticipates potential risks and formulates contingency plans to deal with them |
| Technology | <ul style="list-style-type: none"> Uses digital applications to record, store, retrieve and share documents |

Unit Mapping Information

Supersedes and is equivalent to BSBPUB502 Develop and manage complex public relations campaigns.

Supersedes but is not equivalent to:

- BSBPUB503 Manage fundraising and sponsorship activities
- BSBPUB504 Develop and implement crisis management plans.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG553 Develop public relations campaigns

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least one public relations campaign.

In the course of the above, the candidate must:

- evaluate complex public relations campaign brief
- analyse target audience and develop range of options for message concepts
- identify and contract external suppliers according to task requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of relevant legislation, codes of practice and national standards that affect public relations
- techniques for evaluating options for message concepts
- public relations campaign budget requirements
- timing and schedule requirements according to task
- ethical and legal frameworks relevant to task
- resource requirements, including:
 - budget
 - timing
 - evaluation measures
- task requirements for:
 - media reach and frequency
 - media operational requirements
- range of media vehicles and factors for consideration prior to use
- techniques for managing complex public relations projects

- techniques used to identify and manage risks.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of public relations communication documents.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG554 Plan and develop public relations publications

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan and develop the design, production, implementation and evaluation of public relations publications, in accordance with organisational requirements.

The unit applies to individuals who possess a sound theoretical knowledge base in public relations management and demonstrate a range of managerial skills to ensure that public relations functions are effectively conducted in an organisation or business area. In this role, individuals may either manage the publication process independently or coordinate the activities of people working under their supervision.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to develop public relations publications | 1.1 Identify objectives, needs, and audience for public relations publications 1.2 Conduct research according to objectives and needs 1.3 Summarise findings to relevant stakeholders 1.4 Analyse and select criteria for segmenting audience according to research findings and objectives 1.5 Define target audience in terms of prospective readers of the publications |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 1.6 Develop target audience profile according to organisational requirements |
| 2. Plan public relations publications | 2.1 Document and obtain agreement on publication objectives and central message from relevant personnel according to legal and regulatory requirements 2.2 Select team members to assist with planning according to skill and knowledge requirements 2.3 Develop and obtain agreement on budgets and schedules from relevant stakeholders 2.4 Identify appropriate suppliers of products and services and obtain quotations, as required 2.5 Develop criteria to test and evaluate success of the publication |
| 3. Develop and evaluate public relations publications | 3.1 Design and write publication text according to communication objectives and house style 3.2 Test document with relevant stakeholders and incorporate findings in the final publication 3.3 Select and contract suppliers to complete publication production processes 3.4 Distribute publication according to public relations plan and legal and regulatory requirements 3.5 Evaluate publication in line with stakeholder feedback and against evaluation criteria |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Gathers and analyses textual information from a range of sources and identifies relevant and key information Assesses workplace documentation for clarity and accuracy to comply with house style and agreed communication objectives |
| Writing | <ul style="list-style-type: none"> Uses clear, accurate and engaging language to develop research briefs and materials in a range of styles for various audiences |
| Oral Communication | <ul style="list-style-type: none"> Employs listening and questioning techniques and negotiation skills to clarify information and confirm understanding Articulates instructions and information using language and features suitable for diverse audiences |

| Skill | Description |
|-------------------------|---|
| Numeracy | <ul style="list-style-type: none">• Uses basic mathematical formula to calculate whole numbers and decimals to determine suppliers' costs, project budgets and projected schedules |
| Self-management | <ul style="list-style-type: none">• Identifies organisational goals and adheres to implicit and explicit organisation policies and procedures• Identifies the implications of legal and regulatory responsibilities related to own work |
| Teamwork | <ul style="list-style-type: none">• Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience and monitoring impact• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction |
| Planning and organising | <ul style="list-style-type: none">• Coordinates and sequences tasks to ensure timelines are met and work flows efficiently• Analyses relevant information to make decisions about staffing, contractors, market segments and target audiences• Evaluates results to identify whether objectives have been met |
| Technology | <ul style="list-style-type: none">• Uses digital applications to record, store, retrieve and share documents |

Unit Mapping Information

Supersedes and is equivalent to BSBPUB501 Manage the public relations process.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG554 Plan and develop public relations publications

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least one public relations document.

In the course of the above, the candidate must:

- identify and obtain agreements for team members budgets, schedules and good and services suppliers to prepare publication assessment criteria
- develop, test and evaluate the public relations documents.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- contents of public relations brief including:
 - target audience segmentation
 - research objectives
 - methodology
 - time schedule
 - budget
 - internal and external factors that impact effectiveness of publications
- internal and external factors that may impact publication requirements
- primary and secondary research methods and use in public relations
- criteria used to select team members
- suppliers who may be required to complete publication production processes
- key provisions of relevant legislation, codes of practice and national standards that affect public relations
- relevance of ethics to public relations.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of previous public relations documents
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG555 Write persuasive copy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to interpret a creative brief and evaluate a range of innovative options to write persuasive copy.

The unit applies to individuals who use well-developed advertising skills and a broad knowledge base to communicate messages in a wide range of contexts. In this role, individuals may develop copy individually or may work in a supervisory, management or freelancing capacity coordinating a team of writers.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish content purpose | 1.1 Identify objectives, timelines and budget according to creative brief 1.2 Assess and select writing techniques according to creative brief |
| 2. Prepare content | 2.1 Evaluate design and copy options according to creative brief 2.2 Select option/s for communicating required information and images within time and budgetary requirements 2.3 Develop persuasive content according to creative brief |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------|--|
| 3. Finalise content | 3.1 Consult with relevant stakeholders for feedback 3.2 Evaluate feedback and produce final persuasive content 3.3 Seek approval for persuasive content from relevant personnel prior to release |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none">Recognises and interprets textual information to establish job requirements from relevant informationProofreads content to ensure accuracy and completeness |
| Writing | <ul style="list-style-type: none">Creates documents to ensure clarity of meaning, accuracy, and consistency of information using specific and detailed language to convey explicit information and requirements. |
| Numeracy | <ul style="list-style-type: none">Interprets numerical information to confirm budget constraints and job deadlines |
| Self-management | <ul style="list-style-type: none">Takes full responsibility for following policies, procedures and legislative requirements |
| Planning and organising | <ul style="list-style-type: none">Accepts responsibility for planning, prioritising and sequencing complex tasks and workloadUses systematic, analytical processes in complex, non-routine situations, designing, gathering relevant information and evaluating optionsDevelops new and innovative ideas through exploration and analysis |
| Technology | <ul style="list-style-type: none">Identifies purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete routine tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBWRT501 Write persuasive copy.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG555 Write persuasive copy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- write at least two persuasive contents in each of the following formats:
 - digital
 - audio.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of creative briefs including:
 - communication purpose and objective
 - positioning strategy
 - customer profile and positioning
 - key messages
 - communication tool
 - call to action
 - budget
 - timeframe
- persuasive content requirements including:
 - positioning
 - key messages
 - call to action
- formatting requirements for content including:
 - language
 - writing style
 - level of detail

- legislation, standards and codes of practice affecting production and delivery of copy
- constraints to be considered during analysis, evaluation and preparation of copy
- organisational policies and procedures relevant to writing copy
- persuasive writing techniques.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures relating to process of copywriting
- relevant legislation, standards and codes of practice
- equipment and resources for advanced copywriting and design.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG621 Develop organisational marketing strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to conduct a strategic analysis to develop an organisational marketing strategy. This involves identifying the organisation's strategic direction, evaluating marketing opportunities and formulating a marketing strategy.

The unit applies to individuals who are senior marketing professionals responsible for providing strategic direction to the marketing function of an organisation. Their responsibilities include analysing information on internal and external business and marketing environment; examining current marketing performance; identifying new marketing opportunities arising from emerging trends; and devising a marketing strategy. Individuals operating at this level generally conduct these activities using information gathered by people working under their direct and indirect supervision at lower levels of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish strategic direction and marketing performance | 1.1 Confirm organisation's mission, vision, purpose, objectives and values 1.2 Complete a situational analysis and identify factors impacting marketing direction and performance of the organisation 1.3 Identify and analyse current key products and services, and major markets for strengths, weaknesses, opportunities and threats |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|--|
| | 1.4 Assess marketing performance against identified objectives for critical success factors, and areas for improvement |
| 2. Evaluate marketing opportunities | 2.1 Identify and analyse marketing opportunities for viability and contribution to the business 2.2 Assess each marketing opportunity, considering external factors such as costs, benefits, risks and opportunities 2.3 Analyse opportunities for likely fit with organisational goals and capabilities 2.4 Evaluate each opportunity and determine impact on current business and customer base |
| 3. Formulate marketing strategy | 3.1 Develop marketing strategy in consultation with key internal stakeholders according to prepared research 3.2 Formulate related key performance indicators for marketing strategy 3.3 Develop risk management strategy, and identify risks and manage contingencies 3.4 Document marketing strategy according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Accesses, analyses and evaluates information from a range of sources relating to the marketing process |
| Writing | <ul style="list-style-type: none"> Uses a range of writing styles to articulate complex concepts Revises and edits documents based on feedback Uses appropriate formats and grammatical structures to present information logically for different audiences |
| Oral Communication | <ul style="list-style-type: none"> Uses appropriate language and non-verbal features to explain and present information to a range of personnel Uses active listening and questioning to elicit feedback and clarify or confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Analyses complex numerical information on trend data, targets and budgets |
| Self-management | <ul style="list-style-type: none"> Works autonomously making high-level decisions to ensure organisational objectives and regulatory requirements are met Understands own legal and ethical rights and responsibilities |

| Skill | Description |
|-------------------------|--|
| Teamwork | <ul style="list-style-type: none">Identifies importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate with whom, why and howFosters a collaborative culture within own sphere of influence, facilitating a sense of commitment to shared goals |
| Planning and organising | <ul style="list-style-type: none">Uses logical planning processes, and an increasingly intuitive understanding of context, to extract relevant details when conducting strategic analysisSystematically analyses information to formulate and evaluate alternative strategiesMakes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account |
| Technology | <ul style="list-style-type: none">Uses a range of digital applications to access data, extract, organise, and integrate relevant information |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG608 Develop organisational marketing objectives.

Supersedes but is not equivalent to BSBCUE605 Develop and maintain a customer engagement marketing strategy.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG621 Develop organisational marketing strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least one organisational marketing strategy.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- cost-benefit analysis techniques
- key provisions of relevant legislation, codes of practice and national standards affecting marketing operations
- organisational structure, policies, procedures, products or services and overall strategic plans of organisation
- principles and concepts of marketing and evaluation methodologies
- situational analysis
- strengths, weaknesses, opportunities and threats (SWOT) analysis
- risk management strategies
- strategic, operational and tactical analysis techniques.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of previous marketing strategy, analyses and plans
- workplace documentation and resources relevant to performance evidence
- legislation, regulations, standards and codes relevant to organisational marketing strategies.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG622 Manage organisational marketing processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage organisational marketing processes.

The unit applies to individuals who are senior personnel responsible for managing the overall marketing process of an organisation and for managing marketing personnel. These individuals typically manage a portfolio of products or services across the organisation, rather than a single product or a few products.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Manage marketing performance | 1.1 Manage marketing efforts for areas of greatest potential for the organisation 1.2 Manage integration of marketing, promotional and sales activities according to strategic marketing objectives 1.3 Monitor product, distribution, pricing and marketing communication policies according to market movements, marketing plan objectives and organisational requirements |
| 2. Manage marketing personnel | 2.1 Communicate strategic marketing objectives across the organisation 2.2 Identify and confirm roles, responsibilities and accountabilities |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>of staff and contractors involved in all elements of marketing effort</p> <p>2.3 Develop communication strategy and confirm collaboration between relevant personnel in the marketing mix</p> <p>2.4 Provide support to individuals and teams</p> <p>2.5 Identify and address individual and team underperformance, according to organisational policies and procedures</p> |
| 3. Evaluate and improve strategic marketing performance | <p>3.1 Monitor overall marketing progress against performance targets use marketing metrics</p> <p>3.2 Analyse marketing outcomes, review strategic objectives and marketing metrics</p> <p>3.3 Analyse successes and performance gaps considering cause and effect</p> <p>3.4 Analyse over or under performance against targets for trends and set new targets, as required</p> <p>3.5 Analyse changes in market phenomena, and identify and document their impact on strategic marketing objectives</p> <p>3.6 Document review of marketing performance against key performance indicators according to organisational requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-----------------|--|
| Reading | <ul style="list-style-type: none"> Accesses information from a range of sources and accurately interprets and analyses data relevant to marketing process |
| Writing | <ul style="list-style-type: none"> Prepares detailed documentation using appropriate terminology and format to convey clear messages to team members and relevant stakeholders |
| Numeracy | <ul style="list-style-type: none"> Analyses and evaluates complex numeric information relating to budgets, targets and trend data |
| Self-management | <ul style="list-style-type: none"> Monitors adherence to organisational policies and objectives Considers own role for its contribution to broader goals of work environment Supports new ideas that contribute to achievement of broader goals |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction Identifies importance of taking audience, purpose and contextual |

| Skill | Description |
|-------------------------|---|
| | factors into account when making decisions about what to communicate with whom, why and how |
| Planning and organising | <ul style="list-style-type: none">• Develops plans to manage relatively complex, non-routine tasks with an awareness of how they contribute to longer term operational and strategic goals• Makes a range of critical and non-critical decision in relatively complex situations, taking a range of constraints into account |
| Problem solving | <ul style="list-style-type: none">• Identifies and addresses some unfamiliar problems of increasing complexity within own scope |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG603 Manage the marketing process.

Supersedes but is not equivalent to BSBMKG611 Manage measurement of marketing effectiveness.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG622 Manage organisational marketing processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage marketing processes for an organisation.

In the course of the above, the candidate must:

- monitor marketing performance and compare performance against key performance indicators
- communicate marketing objectives to relevant personnel according to organisation requirements
- capitalising on over-performance and minimising under-performance against marketing objectives.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- economic, social and industry directions, trends and practices relevant to marketing in an organisation
- different marketing organisational structures, roles, responsibilities and policies
- industry product and service knowledge
- principles of marketing, strategic analysis and strategic management
- marketing performance targets including:
 - activity, quality, cost, and time requirements
- communication strategies
- statistical and data evaluation techniques to measure marketing performance
- performance management and mentoring of individuals and teams.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG623 Develop marketing plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to research, develop and present marketing plans for an organisation.

The unit applies to individuals working in senior marketing positions who are responsible for formulating a marketing plan by developing specific marketing strategies and tactics in accordance with the organisation's overall marketing objectives. Individuals operating at this level may receive input from people working under their supervision, who collect information required to devise specific marketing strategies and tactics.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to write marketing plan | 1.1 Research market conditions 1.2 Consult with key stakeholders and seek additional context 1.3 Review any previous marketing plans and marketing performance, where possible 1.4 Collate information for development of marketing plan |
| 2. Write marketing plan | 2.1 Develop marketing objectives according to organisational goals and targets 2.2 Develop marketing strategies according to marketing objectives and legal and ethical requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------|---|
| | 2.3 Develop budget and timeline according to marketing strategy 2.4 Develop action plan according to marketing strategy and organisational, legal and ethical requirements 2.5 Develop a marketing performance review strategy for the assessment of organisational performance against marketing objectives |
| 3. Finalise marketing plan | 3.1 Communicate marketing plan to relevant stakeholders and seek approval within required format and timeframe 3.2 Adjust marketing plan in response to feedback from key stakeholders 3.3 Distribute marketing plan for implementation within required timeframe 3.4 Store marketing plan according to organisational policy and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Accesses information from a range of sources and accurately analyses and evaluates complex information relating to the marketing process |
| Writing | <ul style="list-style-type: none"> Uses a range of writing styles to articulate complex concepts and ideas Revises and edits documents based on feedback Uses appropriate formats and grammatical structures to present information logically for different audiences |
| Oral Communication | <ul style="list-style-type: none"> Uses appropriate language and non-verbal features to explain and present information to a range of personnel Uses active listening and questioning to elicit feedback |
| Numeracy | <ul style="list-style-type: none"> Analyses and manages complex information relating to timelines, targets and budgets |
| Self-management | <ul style="list-style-type: none"> Works autonomously making high level decisions to ensure organisational objectives and regulatory requirements are met Understands own legal and ethical rights and responsibilities |
| Problem solving | <ul style="list-style-type: none"> Uses problem-solving processes to identify key information and issues, evaluate alternative strategies, anticipate consequences and consider implementation issues and contingencies |

| Skill | Description |
|-------------------------|---|
| Planning and organising | <ul style="list-style-type: none">Accepts responsibility for planning and sequencing complex tasks and workload to meet timelines |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG609 Develop a marketing plan.

Supersedes but is not equivalent to BSBMKG610 Develop, implement and monitor a marketing campaign.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG623 Develop marketing plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop one marketing plan according to organisational objectives, including:
 - researching information
 - consulting with stakeholders
 - developing marketing objectives, strategies, budget and a marketing performance review strategy according to task requirements
 - seeking approval for marketing plan from relevant stakeholders
 - adjusting and disseminating final marketing plan according to feedback and organisational policy and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational structure, products and services and strategic and marketing objectives
- components of a marketing plan including:
 - environmental analysis
 - segmentation, target market and positioning
 - market objectives
 - marketing strategy or marketing mix
 - budget
 - implementation plan
 - monitor or evaluation control plan including risk contingency plan
- common marketing opportunities including:
 - strategic alliances and cooperative business models
 - new products or services that target specific markets

- greater market penetration with existing products or services
- take-overs
- new businesses and franchising
- common marketing strategies and marketing approaches
- processes to ensure marketing strategies, approaches and marketing mix align to organisation's objectives and are legal, ethical and achievable
- legislative and regulatory context of the organisation as relevant to the marketing plan.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to developing marketing plans
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG624 Manage market research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prepare for, manage and evaluate market research projects across an organisation.

The unit applies to individuals who are senior marketing professionals responsible for preparing market research plans for implementation, engaging external consultants, managing market research activity, and evaluating research processes and findings across an organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare market research plans for implementation | 1.1 Access policies and procedures and relevant regulatory guidelines relevant to market research 1.2 Develop and review market research project plan to point of finalisation 1.3 Identify and obtain required resources for implementation of market research project plan and work plans |
| 2. Engage external consultants or service providers | 2.1 Identify requirements for external consultants or service providers from market research project plan 2.2 Specify products and services required to implement plans, and detail criteria for selection |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.3 Identify and select external consultants or service providers of required products and services 2.4 Contract selected consultants or providers of products and services |
| 3. Manage market research activity | 3.1 Monitor work plan activity and confirm market research project plan comply with relevant organisational and legal requirements 3.2 Confirm compliance with organisational market research policy and procedures 3.3 Manage external consultants and providers of products and services, and confirm performance is in line with expectations and contractual requirements |
| 4. Evaluate research processes and findings | 4.1 Obtain research processes and findings 4.2 Confirm validity of information and data obtained 4.3 Review relevance and usefulness of findings from market research against research objectives outlined in market research project plan 4.4 Assess performance of project against relevant elements of market research project plan 4.5 Seek feedback from relevant stakeholders on research process and findings 4.6 Prepare reports for future improvements to research process 4.7 Implement revised policy and practices according to organisational requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Accesses complex information from a range of sources and accurately analyses data relevant to marketing activities |
| Writing | <ul style="list-style-type: none"> Prepares a range of workplace documentation, using clear language and required format, to convey priorities and critical strategic information |
| Oral Communication | <ul style="list-style-type: none"> Actively participates in verbal exchanges using suitable language and non-verbal features Uses active listening and questioning techniques to confirm understanding |

| Skill | Description |
|-------------------------|---|
| Numeracy | <ul style="list-style-type: none">Measures and analyses complex numeric information during evaluation process |
| Self-management | <ul style="list-style-type: none">Understands and adheres to organisational policies and objectivesIs highly autonomous, taking responsibility and ownership for most or all aspects of own work |
| Teamwork | <ul style="list-style-type: none">Identifies importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate with whom, why and how |
| Planning and organising | <ul style="list-style-type: none">Uses logical planning processes, and an increasingly intuitive understanding of context, to gather relevant information |
| Problem solving | <ul style="list-style-type: none">Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into accountRecognises potential of new approaches to enhance work practices and outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG607 Manage market research.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG624 Manage market research

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare, manage, implement and evaluate at least one market research plan, including:
 - developing specifications for research components, outsourced to external consultants
 - managing market research activities according to organisational policy and procedures
 - evaluating research processes and findings against relevant market research project plan and work plans
 - preparing and presenting a report on market research findings.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- principles and practices of market research including:
 - data processing methods and data analysis techniques
 - project design to meet given budgets and other resource constraints
 - qualitative and quantitative research
 - sample design
 - development and application of hypotheses
 - role of research in enterprise development
 - use of survey instruments
- project management principles and practices, including:
 - consultation and stakeholder involvement
 - development of policies and procedures
 - methods of action to ensure performance
 - monitoring of timelines, budgets and other implementation plans
 - organisational procedures for engagement of consultants

- provisions of relevant legislation, codes of practice and national standards affecting market research.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of previous market research plans and exemplars of market research project specifications.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG625 Implement and manage international marketing programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assess the international environment, identify market factors and risks, and manage and evaluate international marketing programs.

The unit applies to individuals who use are senior marketing or management personnel or those who have responsibility for international marketing programs.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop international marketing objectives | <ul style="list-style-type: none">1.1 Select international marketing opportunities and develop objectives according to organisation's capabilities and resources1.2 Identify international marketing objectives according to organisation's strategic direction1.3 Develop strategic objectives and related key performance indicators by product, service, country or international grouping, and overall performance1.4 Relate risk factors to international business cycles and terms of economic conditions and estimate their impact on potential market |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| 2. Determine marketing approach and operational structure | 2.1 Identify resources and capabilities for implementation of program 2.2 Identify global and customised approaches for promotion of products or services 2.3 Identify options for choice of marketing approaches |
| 3. Implement programs | 3.1 Implement program according to agreed timelines 3.2 Provide support and assistance to staff and contractors involved in implementing the program 3.3 Manage integration of marketing, promotional and sales activities according to international marketing objectives 3.4 Assess and respond to the need for adjustments to plans, systems and procedures 3.5 Provide progress and other reports according to event requirements |
| 4. Evaluate and improve international marketing performance | 4.1 Monitor product, pricing and distribution policies related to market changes, objectives of marketing plan and organisational requirements 4.2 Monitor marketing progresses against performance targets and confirm activity, quality, cost, and time requirements are met 4.3 Review and revise marketing outcomes and objectives 4.4 Analyse successes and performance gaps in relation to cause and effect, and improve international marketing performance 4.5 Analyse changes in market phenomena, and identify and document potential impact on international marketing objectives 4.6 Document review of marketing performance against key performance indicators according to organisational requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------|--|
| Numeracy | <ul style="list-style-type: none"> Performs complex mathematical calculations to analyse trend data, business development opportunities and cost benefit analyses |
| Reading | <ul style="list-style-type: none"> Researches and analyses a range of textual information from a variety of sources to identify key details and determine relevance |

| Skill | Description |
|-------------------------|---|
| | to strategic organisational requirements |
| Writing | <ul style="list-style-type: none">Records results of research and analysis using language and format appropriate to organisation and purpose |
| Planning and organising | <ul style="list-style-type: none">Uses logical planning processes, and an increasingly intuitive understanding of context, to identify risk factors, and to evaluate alternative strategies and resources |
| Problem solving | <ul style="list-style-type: none">Makes a range of critical and non-critical decisions in relatively complex situations, analysing information and taking a range of factors and constraints into account |
| Technology | <ul style="list-style-type: none">Identifies potential of new approaches, including new technologies, to enhance work practices and outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBMKG606 Manage international marketing programs.

Supersedes but is not equivalent to BSBMKG605 Evaluate international marketing opportunities.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG625 Implement and manage international marketing programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement and manage at least one international marketing program.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures related to international marketing programs
- provisions of legislation, codes of practice and standards for international marketing programs
- KPIs for international marketing programs
- impacts of market changes on international marketing programs
- common international marketing strategies and approaches
- risk factors and mitigation strategies for international marketing opportunities
- processes for implementing an international marketing plan.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace policies and procedures for international marketing
- legislation, regulations, standards and codes on international marketing.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG626 Develop advertising campaigns

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop advertising campaigns in response to an advertising brief. This includes clarifying and defining campaign objectives, preparing the advertising budget, and scheduling.

The unit applies to individuals working in a senior advertising management or account management role within an advertising or media organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Define campaign objectives | 1.1 Identify advertiser's purpose and objectives according to advertising brief 1.2 Identify campaign objectives according to time, budget, product and market factors 1.3 Verify with relevant stakeholders campaign objectives taking into consideration factors which may affect consumer responses and legal and ethical requirements |
| 2. Prepare advertising budget | 2.1 Assess and identify research resource requirements for the advertising campaign 2.2 Assess and identify resource requirements for range of media options, creative and production services |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.3 Allocate relevant resources to each component of advertising campaign 2.4 Verify overall budget meets advertising brief requirements |
| 3. Develop schedule for proposed advertising activities | 3.1 Confirm campaign length and timing from the advertising brief 3.2 Identify service providers with required expertise and negotiate their costs and availability 3.3 Base the choice of service providers on merit and value for money according to organisational requirements 3.4 Confirm time allowed in schedule will meet creative, media and production requirements and achieve advertising objectives |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates complex texts to determine requirements of the brief, and relevant legal and ethical requirements |
| Writing | <ul style="list-style-type: none"> Develops material for a specific audience using clear and detailed language to convey explicit information |
| Oral Communication | <ul style="list-style-type: none"> Interacts effectively to question and clarify objectives with the advertiser using appropriate listening and questioning |
| Numeracy | <ul style="list-style-type: none"> Develops budget and schedules according to requirements of the advertising brief |
| Self-management | <ul style="list-style-type: none"> Accepts responsibility for analysis of campaign requirements and management of related tasks and workload |
| Teamwork | <ul style="list-style-type: none"> Uses collaborative techniques to engage external suppliers in consultation and negotiation |
| Planning and organising | <ul style="list-style-type: none"> Uses systematic, analytical processes in relatively complex situations; setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria |
| Technology | <ul style="list-style-type: none"> Uses main features and functions of digital technologies and tools to complete work tasks efficiently and effectively |

Unit Mapping Information

Supersedes and is equivalent to BSBADV602 Develop an advertising campaign.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG626 Develop advertising campaigns

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least two advertising campaigns.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- principles of effective advertising for different markets
- contents of advertising briefs
- ethical requirements relevant to the advertising industry
- organisational products or services
- principles and purposes of advertising, consumer behaviour, and influences on buyer behaviour
- provisions of relevant legislation, codes of practice and national standards affecting business operations.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and codes of practice for advertising campaigns
- organisational policies and procedures on advertising campaigns
- business technology for developing advertising campaigns.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG627 Execute advertising campaigns

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to execute an advertising campaign including preparing, implementing and monitoring an advertising campaign.

The unit applies to individuals who work in senior advertising roles within an advertising or media organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare advertising campaign | 1.1 Identify task requirements from advertising brief 1.2 Develop plan for advertising campaign according to organisational, legal and ethical requirements 1.3 Negotiate media contracts |
| 2. Implement advertising campaign | 2.1 Organise and brief required resources for implementation of advertising campaign according to legal requirements 2.2 Communicate task requirements to relevant stakeholders according to advertising campaign plan 2.3 Develop processes to support relevant personnel to fulfil implementation requirements |
| 3. Monitor advertising | 3.1 Review performance of campaign at allocated campaign points |

| ELEMENT | PERFORMANCE CRITERIA |
|----------|---|
| campaign | <p>according to task requirements, legal and ethical requirements</p> <p>3.2 Identify and address variations in performance between expected and actual performance</p> <p>3.3 Identify areas of improvement in future execution of advertising campaigns</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Evaluates outcomes of decisions to identify opportunities for improvement |
| Numeracy | <ul style="list-style-type: none"> Develop budget and schedules according to requirements of the advertising campaign |
| Reading | <ul style="list-style-type: none"> Evaluates and analyses textual information to determine requirements according to media plans and creative brief Analyses and interprets a range of familiar industry information and complex legal texts |
| Writing | <ul style="list-style-type: none"> Records information according to organisational requirements Composes and edits texts, selecting appropriate vocabulary and structure for audience and purpose |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for adherence to legal and ethical requirements in coordination and monitoring of advertising campaigns |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules complex activities and tasks, and monitors implementation Systematically gathers and analyses all relevant information to makes decisions about campaign delivery and performance evaluation |
| Technology | <ul style="list-style-type: none"> Selects and uses appropriate digital tools and measurement systems to perform complex analytical tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBADV604 Execute an advertising campaign.

Supersedes but is not equivalent to BSBADV605 Evaluate campaign effectiveness.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG627 Execute advertising campaigns

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- execute at least two advertising campaigns.

In the course of the above, the candidate must:

- establish processes required to implement advertising campaign.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- media pricing policies and contractual considerations
- campaign contingencies
- organisational budget, products and services
- principles of advertising
- print, television, film, video production processes
- legal and ethical requirements, code of practice and national standards relating to executing advertising campaigns
- specifications in advertising briefs.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and codes of practice relevant to executing an advertising campaign
- organisational policies and procedures for execution of advertising campaigns
- advertising brief

- technology and software for execution of advertising campaigns.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBMKG628 Lead organisational public relations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead public relations in an organisation by developing and implementing plans to improve public relations policies and procedures and evaluate performance.

The unit applies to individuals who are managers with responsibilities that extend across the organisation or across significant parts of a large organisation. They may have a dedicated role in public relations or work in a public relations policy area.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Technical Skills – Marketing

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify organisational public relations | <ul style="list-style-type: none">1.1 Research organisational best practice in area of public relations1.2 Review existing organisational public relations policies and procedures according to legislative, ethical and organisational requirements1.3 Identify public relations gaps and areas for improvement in existing policies and procedures according to best practice and legislative and ethical requirements1.4 Develop plan and update organisational policies and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 1.5 Address best practice in consultation with relevant stakeholders according to organisational policies and procedures |
| 2. Promote public relations in organisation | 2.1 Implement public relations processes in consultation with relevant personnel 2.2 Evaluate and address opportunities to improve existing public relations processes in consultation with team 2.3 Provide support to relevant team members |
| 3. Monitor public relations | 3.1 Seek feedback from clients and internal personnel on opportunities for improvement to organisational public relations processes 3.2 Evaluate performance of public relations processes against organisational public relations objectives 3.3 Document feedback on public relations changes according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-----------------|--|
| Learning | <ul style="list-style-type: none"> Actively looks for and accepts ways to maintain and improve own skills and performance |
| Reading | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types |
| Writing | <ul style="list-style-type: none"> Records information according to organisational requirements Composes and edits texts, selecting appropriate vocabulary and structure for audience and purpose |
| Teamwork | <ul style="list-style-type: none"> Collaborates and cooperates with others, playing an active role in leading and facilitating effective group interaction and influencing direction |
| Self-management | <ul style="list-style-type: none"> Makes high-level decisions related to the achievement of organisational goals Identifies and complies with ethical and other organisational responsibilities Accepts responsibility for planning and sequencing complex tasks and workload of self and others Identifies systems, devices and applications with potential to meet current or future needs |

| Skill | Description |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Uses systematic, analytic processes in complex, non-routine situations, setting goals, designing strategies, gathering relevant information and evaluating options to inform decision-making• Sequences and schedules complex activities of self and others and manages relevant communication• Uses formal and informal processes to monitor implementation of public relations systems, reflect on outcomes and then take appropriate action when required |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBMKG628 Lead organisational public relations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead public relations for an organisation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational public relations policies and procedures
- principles and theories of public relations
- best practice in public relations
- key provisions of relevant legislation, codes of practice and national standards that affect public relations campaigns.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislations and codes of practice relevant to leading organisational public relations
- organisational policies and procedures for leading organisational public

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS101 Use business resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify, use and maintain resources to complete a variety of tasks under direct supervision.

The unit applies to those who are required to use a variety of business resources. These individuals typically work under supervision and guidance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare resources | 1.1 Identify business resources according to task requirements 1.2 Estimate quantities of resources required to complete the task 1.3 Access business resources with supervision 1.4 Check resources for usability according to task and organisational requirements |
| 2. Operate resources | 2.1 Use resource according to task requirements and under direct instruction 2.2 Identify resource shortages or faults and take action to ensure issue is resolved 2.3 Report issues outside area of own responsibility to appropriate personnel |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------|--|
| 3. Maintain resources | 3.1 Identify maintenance requirements of resources 3.2 Undertake maintenance for resource according to organisational requirements 3.3 Maintain records relating to resources under direct instructions 3.4 Store resources under direct instructions |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Follows instructions in familiar texts |
| Writing | <ul style="list-style-type: none"> Records and updates documents according to instructions |
| Oral communication | <ul style="list-style-type: none"> Follows simple instructions Asks clarifying questions and responds to answers |
| Numeracy | <ul style="list-style-type: none"> Uses rounding and other mathematical techniques to estimate quantity requirements |
| Self-management | <ul style="list-style-type: none"> Follows organisational procedures when tasks are beyond own level of responsibility Follows clearly defined instructions provided by others |
| Planning and organising | <ul style="list-style-type: none"> Completes routine tasks taking some limited responsibility for decisions regarding equipment and resource choices, operation and maintenance |
| Problem solving | <ul style="list-style-type: none"> Responds to routine problems by referring to instructions or standard procedures |

Unit Mapping Information

Supersedes and is equivalent to BSBADM101 Use business equipment and resources.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS101 Use business resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use business resources on at least two occasions, including:
 - choosing business resources required for tasks
 - operating resources according to manufacturer and organisational requirements
 - reporting shortages and faults according to organisational requirements
 - maintaining resources and records according to instructions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- functions of available business resources
- procedures for operating the available business resources, including safety requirements
- common faults of business resources
- procedures for maintaining and storing resources.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- operational and maintenance manuals
- organisational procedures related to operation and maintenance of resources
- records relating to resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS201 Work effectively in business environments

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to work effectively in business environments. It includes identifying and working to organisational standards, managing workload and working as part of a team.

The unit applies to those who work in a broad range of settings. These individuals typically work under some supervision and guidance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify the business context | 1.1 Identify organisational requirements and responsibilities and confirm understanding with relevant personnel 1.2 Identify legal rights and responsibilities of employees and employers 1.3 Identify requirements for duty of care and organisational objectives, standards and values 1.4 Identify and distinguish between roles and responsibilities of staff within organisational structure 1.5 Identify own role and task requirements within a team |
| 2. Work in a team | 2.1 Identify and follow requirements for a safe work environment 2.2 Communicate and collaborate with relevant personnel in a |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|--|
| | <p>courteous and non-discriminatory manner</p> <p>2.3 Complete allocated tasks according to organisational requirements</p> <p>2.4 Use questioning techniques to clarify instructions and responsibilities</p> <p>2.5 Seek assistance when difficulties arise and escalate issues to team leaders, as required</p> |
| 3. Develop effective work habits | <p>3.1 Identify work and personal priorities</p> <p>3.2 Apply time management strategies to work duties</p> <p>3.3 Communicate workload issues to team leaders in a timely manner</p> <p>3.4 Seek and act upon feedback from relevant personnel</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Reviews documentation to identify relevant information for requirements of job role and organisation |
| Writing | <ul style="list-style-type: none"> Completes documentation necessary for work tasks and reporting requirements using clear, concise and accurate grammar and language |
| Oral communication | <ul style="list-style-type: none"> Clarifies requirements and responsibilities of job role and organisation by using effective questioning and listening techniques to seek advice, information and feedback Contributes to an effective working environment by communicating with others, behaving courteously and using non-discriminatory language |
| Enterprise and initiative | <ul style="list-style-type: none"> Follows clear instructions within defined level of responsibility, seeking clarification when required Identifies and accepts responsibility for working within common work frameworks Identifies organisational expectations and follows explicit protocols and procedures |
| Teamwork | <ul style="list-style-type: none"> Identifies common differences in other people and implements basic strategies to address own reaction to these differences Uses basic communication strategies to implement and complete work tasks including seeking advice when required |
| Planning and | <ul style="list-style-type: none"> Follows clearly defined instructions and sequencing, and monitors |

| Skill | Description |
|------------|---|
| organising | own progress for tasks, seeking assistance when necessary |

Unit Mapping Information

Supersedes and is equivalent to BSBIND201 Work effectively in a business environment.

Supersedes but is not equivalent to:

- BSBFRA301 Work within a franchise
- BSBIND301 Work effectively in an educational environment
- BSBIND302 Work effectively in the international education services industry
- BSBWOR302 Work effectively as an off-site worker.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS201 Work effectively in business environments

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- complete at least four tasks in a business environment, including:
 - working to organisational standards
 - managing workload
 - working as part of a team.

In the course of the above, the candidate must:

- comply with legal responsibilities, and organisational requirements
- escalate issues and seek assistance.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures that apply to employer and employee rights in a business environment
- organisational documents relating to effective business operations, including:
 - work health and safety policy
 - code of conduct policy
 - style guide
 - duty of care
- roles, responsibilities and conditions of employment contract for own work role.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- codes of practice relevant to performance evidence
- organisational policies and procedures
- workplace documentation and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS202 Engage with customers

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to participate effectively in customer engagement, including complying with organisational requirements and using a variety of communication methods.

The unit applies to those who perform a range of mainly routine tasks, using limited practical skills and fundamental operational knowledge and who work under some supervision and guidance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish customer demands | 1.1 Identify personal targets and key performance indicators (KPIs) for customer engagement according to organisational policy and procedures 1.2 Identify and confirm customer requirements 1.3 Identify options to meet customer expectations according to organisational policies and procedures 1.4 Adapt options to customer requirements according to organisational policies |
| 2. Provide customer service | 2.1 Select product or service in consultation with customer 2.2 Explain relevant information and actions to customer and |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|---|
| | confirm all details 2.3 Action customer orders and escalate queries that cannot be immediately satisfied according to organisational policies and procedures 2.4 Record details of engagement according to organisational policy |
| 3. Finalise customer engagement | 3.1 Supply follow-up information to customer according to organisational policies and procedures 3.2 Evaluate compliance with organisational policies and procedures 3.3 Seek customer feedback and identify opportunities to enhance service on future engagements 3.4 Record and report opportunities for continuous improvement |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and evaluates a range of texts to determine product information, performance standards and guidelines, and business requirements |
| Writing | <ul style="list-style-type: none"> Prepares clear and specific information which conveys an understanding of service requirements, outcomes and alternatives for customers and workplace personnel |
| Oral communication | <ul style="list-style-type: none"> Articulates clearly, using industry-specific language suitable to audience to convey requirements and listening and questioning techniques to confirm understanding |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies organisational expectations and follows explicit protocols and procedures, regulations and standards in performance of job role |
| Teamwork | <ul style="list-style-type: none"> Follows accepted communication practices and protocols in the provision of customer service Adjusts communication style in response to differences in customer profile, expectations and requirements |
| Planning and organising | <ul style="list-style-type: none"> Plans and implements routine customer service tasks and related workload, making limited decisions on sequencing and timing with support as required from relevant personnel Analyses task requirements to decide on appropriate customer service options |

| Skill | Description |
|------------|--|
| | <ul style="list-style-type: none">Identifies difficulties that might present continuous improvement opportunities |
| Technology | <ul style="list-style-type: none">Identifies key features of common digital systems and tools and operates them effectively to manage customer communication |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBCUE203 Conduct customer engagement
- BSBCUE205 Prepare for work in a customer engagement environment
- BSBCUE302 Deploy customer service field staff
- BSBCUE307 Work effectively in customer engagement.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS202 Engage with customers

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- engage with at least three different customers, by:
 - providing customer service according to organisational standards and guidelines
 - using communication equipment and systems efficiently and effectively
 - adapting communication techniques to suit customer profile and requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- operational environment, including customer base and products and services of the organisation
- organisational performance standards and customer service expectations
- organisational policies, procedures, protocols for customer engagement
- relevant product or service details
- equipment and systems to manage customer engagement
- customer service in different contexts and customer behaviour in different contexts
- sources of information to develop customer service skills including relevant organisational personnel
- follow-up considerations for customer queries, including:
 - engagement escalation policy
 - business rules and practices
 - customer expectations
- principles of customer service
- continuous improvement methods including customer retention strategies
- procedures for the operation of telecommunication equipment and systems, relevant to customer service.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace information and data
- performance management records and data and quality assurance guidelines
- customer engagement policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS203 Deliver a service to customers

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to deliver aspects of customer service at an introductory level. It includes creating a relationship with customers, identifying their needs, delivering services or products, and processing customer feedback.

The unit applies to those who perform a range of routine tasks in the workplace using a limited range of practical skills and fundamental knowledge of customer service in a defined context under direct supervision or with limited individual responsibility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish contact with customers | 1.1 Greet customers according to organisational requirements 1.2 Share relevant information with customers 1.3 Identify and respond to specific customer requirements 1.4 Express interest in customer needs and develop rapport with customer |
| 2. Identify customer needs | 2.1 Ask questions to identify customer needs 2.2 Assess customer needs for urgency and identify priorities for service delivery 2.3 Provide customer with information about available options |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|---|
| | 2.4 Assess limitations in addressing customer needs and seek assistance from designated persons, where required |
| 3. Provide service to customers | 3.1 Confirm details of service and delivery with customer according to organisational requirements 3.2 Convey information regarding problems and delays, and follow-up within appropriate timeframes, where required 3.3 Identify opportunities to enhance the quality of service and products, and take action to improve the service |
| 4. Process customer feedback | 4.1 Seek customer feedback and handle according to organisational and legislative requirements 4.2 Record feedback and communication between customer and the organisation according to organisational requirements 4.3 Identify any unmet customer needs and discuss suitability of alternative products or services 4.4 Encourage customers to maintain contact with organisation for future needs |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies requirements from organisational policy and procedure documents Interprets product and service information in a range of formats to provide customer advice |
| Writing | <ul style="list-style-type: none"> Records customer information according to organisational requirements |
| Oral communication | <ul style="list-style-type: none"> Provides information and advice using structure and language to suit the audience Asks questions and listens to gain information and confirm understanding |
| Planning and organising | <ul style="list-style-type: none"> Follows organisational procedures and practices relevant to own role |
| Teamwork | <ul style="list-style-type: none"> Uses accepted communication practices to establish connections, build rapport and develop professional working relationships Adjusts personal communication style in response to the opinions, values and needs of others |

| Skill | Description |
|---------------------------|---|
| Initiative and enterprise | <ul style="list-style-type: none">Identifies opportunities to enhance work practices and outcomes |
| Problem solving | <ul style="list-style-type: none">Addresses routine problems in familiar work contexts |

Unit Mapping Information

Supersedes and is equivalent to BSBCUS201 Deliver a service to customers.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS203 Deliver a service to customers

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- deliver a service to at least three different customers.

In the course of the above, the candidate must:

- greet the customer and establish rapport according to organisational requirements
- identify customer needs using interpersonal skills
- provide prompt service to address customer needs
- identify and follow up opportunities to increase the quality of service and products
- respond to and record all customer feedback according to organisational standards, policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of customer service legislation and consumer law
- requirements for responding to the needs of customers from a diverse background
- workplace organisational policies and procedures relating to customer service and the customer service process.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents, and organisational policies and procedures for customer service
- examples of customer complaints and feedback.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS301 Maintain business resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to determine, administer and maintain resources and equipment to complete a variety of tasks.

The unit applies to those who apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of business resources and their basic maintenance to provide some technical advice and support to a team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Advise on resource requirements | 1.1 Calculate current business resource needs according to organisational requirements 1.2 Calculate estimates of future business resource needs according to organisational requirements 1.3 Provide advice on equipment, material and supplier selection 1.4 Identify resource shortages and possible impact on operations |
| 2. Acquire resources | 2.1 Obtain resources according to timelines and identified organisational requirements 2.2 Store resources according to identified organisational requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.3 Review resource acquisition processes and identify opportunities for improvements in future resource acquisitions |
| 3. Monitor resource usage and maintenance | 3.1 Confirm handling of resources is according to organisational and work health and safety requirements 3.2 Identify resource monitoring tool and monitor use of resources 3.3 Consult individuals and teams and facilitate effective decision-making on the appropriate allocation of resources 3.4 Monitor and compare resource usage with estimated requirements in budget plans |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from a range of sources, including organisational policies and procedures |
| Writing | <ul style="list-style-type: none"> Uses clear and succinct language and appropriate layout to provide information, advice and support materials |
| Oral communication | <ul style="list-style-type: none"> Presents information or advice choosing language appropriate to the context and needs of the audience Uses active listening and questioning to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Selects and uses appropriate tools to aid with estimation and other resource assessment requirements Uses a combination of informal and some formal written mathematical equations to represent the outcomes of the resource allocation process |
| Enterprise and initiative | <ul style="list-style-type: none"> Takes some personal responsibility for adherence to organisational procedures and protocols |
| Teamwork | <ul style="list-style-type: none"> Uses collaborative techniques to engage personnel in consultations and negotiations |
| Planning and organising | <ul style="list-style-type: none"> Plans a range of routine tasks and required resources, accepting goals and aiming to achieve them within allocated timeframes Evaluates effectiveness of decisions in terms of how well they met stated goals |
| Problem solving | <ul style="list-style-type: none"> Identifies and takes responsibility for addressing predictable problems in familiar work contexts |

| Skill | Description |
|------------|--|
| Technology | <ul style="list-style-type: none">Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to roleIdentifies purpose and some specific functions of some common digital tools used in work contexts |

Unit Mapping Information

Supersedes and is equivalent to BSBADM311 Maintain business resources.

Supersedes but is not equivalent to BSBFLM306 Provide workplace information and resourcing plans.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS301 Maintain business resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- maintain at least three business resources.

In the course of the above, the candidate must:

- collect and record data on resource use
- evaluate use of resources according to organisational requirements
- monitor resource use over defined and operational timeframes
- comply with organisational policies while using resources.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of legislation relating to maintaining business resources
- organisational resource acquisition policies, plans and procedures
- organisational requirements for handling resources including:
 - acquiring resources
 - storing resources
- organisational procedures for record keeping and filing systems, security and safe recording practices.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational resource use data.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS302 Identify business risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to contribute to business operations through the identification of business risk. It involves identifying business risks, as well as supporting managers and supervisors in mitigating risk.

The unit applies to those required to contribute to the identification of business risks as part of broader responsibilities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish business risk | 1.1 Identify potential business risks according to task requirements 1.2 Assess organisational policies and procedures for addressing risks 1.3 Identify organisational personnel involved in addressing relevant risk types |
| 2. Mitigate business risk | 2.1 Analyse potential consequences for organisation of identified risks 2.2 Address risks according to organisational policies and procedures, escalating, where required 2.3 Document steps to mitigate identified risks according to organisational policies and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| 3. Finalise resolution of business risk | 3.1 Confirm steps taken with relevant organisational personnel 3.2 Seek feedback on response with relevant organisational personnel 3.3 Contribute to identifying ways to minimise future risk in consultation with relevant organisational personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Interprets and identifies from risk legislation, workplace policy and procedure and records |
| Writing | <ul style="list-style-type: none">Uses formats and language appropriate to audience |
| Initiative and enterprise | <ul style="list-style-type: none">Follows legal and regulatory responsibilities and organisational policies and procedures in relation to risk mitigation role |
| Teamwork | <ul style="list-style-type: none">Shares relevant information and resources with organisational personnel |
| Planning and organising | <ul style="list-style-type: none">Plans and implements tasks to achieve required outcomesUses formal decision-making processes, gathering information and identifying and evaluating choices against risk management processes |
| Technology | <ul style="list-style-type: none">Uses technology to access and filter data and then extract, organise, integrate and share information |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS302 Identify business risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify and resolve two different business risks.

In the course of the above, the candidate must:

- identify business risk and organisational policies and procedures for addressing identified risk
- analyse potential impact of risk for business and address risk according to organisational policies and procedures
- document risk mitigation processes taken according to organisational policies and procedures
- confirm and seek feedback on risk mitigation methods
- participate in discussions to minimise future risks in consultation with relevant personnel.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- types of business risks including:
 - strategic risks
 - compliance risks
 - financial risks
 - operational risks
- common sources of business risk
- techniques to manage business risks applicable to the industry
- functions and content of organisational risk management plan
- organisational policies and procedures for risk identification and mitigation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation, regulations and standards relevant to business risks
- workplace documentation and resources for business risks.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS303 Organise schedules

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage appointments and diaries for personnel within an organisation. It involves using manual and electronic diaries, schedules and other appointment systems.

The unit applies to those employed in a range of work environments who provide administrative support to teams and individuals.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish schedule requirements | 1.1 Identify organisational requirements and protocols for staff planning tools 1.2 Identify organisational procedures for different types of appointments 1.3 Establish schedule management requirements of relevant personnel 1.4 Identify task items for individuals according to requirements 1.5 Develop appointment schedule and priorities and clarify in discussion with individual personnel |
| 2. Manage schedules | 2.1 Schedule recurring appointments and deadlines according to individual and organisational requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|--|
| | 2.2 Schedule new appointments according to timelines and diary commitments 2.3 Negotiate alternative arrangements to established appointments and confirm changes 2.4 Record appointments and manage schedules according to organisational policy and procedures |
| 3. Evaluate effectiveness of schedule | 3.1 Seek feedback on schedule from organisational personnel 3.2 Assess effectiveness of schedule in meeting task requirements 3.3 Identify areas for improvement in appointment scheduling system |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Makes time estimations and checks logistics when scheduling appointments |
| Oral communication | <ul style="list-style-type: none"> Participates effectively in spoken interactions using listening and questioning techniques to confirm and clarify understanding |
| Reading | <ul style="list-style-type: none"> Interprets textual information from a range of sources and identifies relevant information |
| Writing | <ul style="list-style-type: none"> Uses clear and succinct language to complete and update workplace documentation |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies and responds to explicit and implicit organisational procedures and protocols |
| Planning and organising | <ul style="list-style-type: none"> Plans a range of routine tasks accepting goals and aiming to achieve them according to predetermined deadlines Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to role Takes responsibility for routine low-impact decisions within familiar situations |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBADM307 Organise schedules.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS303 Organise schedules

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage appointments and diaries for at least three personnel within an organisation
- schedule at least five appointments according to requirements, availability of attendees, timelines and diary commitments.

In the course of the above, the candidate must:

- record appointments according to organisational policy and procedures
- assess the functionality of scheduling systems
- develop and implement solutions to improve future scheduling engagements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational requirements for managing appointments for personnel in the organisation
- range of appointment scheduling systems and their features that could be used when organising schedules.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- range of diaries, planners and calendars to record and schedule appointments, including digital resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS304 Deliver and monitor a service to customers

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify customer needs, deliver and monitor customer service and identify improvements in the provision of customer service.

The unit applies to those who apply a broad range of competencies in various work contexts. In this role, individuals often exercise discretion and judgement using appropriate knowledge of customer service. They provide technical advice and support to customers over short or long-term interactions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify customer needs | 1.1 Identify and clarify customer needs and expectations 1.2 Evaluate customer needs and determine priorities for service delivery according to organisational requirements 1.3 Inform customers about available choices for meeting their needs and assist selection of preferred options 1.4 Identify limitations in addressing customer needs and seek assistance from designated individuals, where required |
| 2. Deliver a service to customers | 2.1 Provide service to meet identified customer needs according to organisational and legislative requirements 2.2 Establish and maintain rapport with customers |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|---|
| | 2.3 Manage customer complaints according to organisational and legislative requirements 2.4 Provide assistance and respond to customers with specific needs according to organisational and legislative requirements 2.5 Identify and use available opportunities to promote and enhance services and products to customers |
| 3. Evaluate customer service delivery | 3.1 Review customer satisfaction with service delivery using verifiable evidence according to organisational and legislative requirements 3.2 Seek and respond to customer feedback according to organisational policies and procedures 3.3 Identify opportunities to enhance the quality of customer service 3.4 Document recommendations for customer service improvements 3.5 Submit recommendations to relevant personnel according to organisational policies and procedures |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Identifies and follows up on opportunities to improve work practices and outcomes |
| Oral communication | <ul style="list-style-type: none"> Provides information or advice using structure and language to suit the audience Asks questions and listens to gain information or confirm understanding |
| Reading | <ul style="list-style-type: none"> Evaluates textual information to determine customer service requirements Proofreads texts for clarity of meaning and accuracy of grammar and punctuation |
| Writing | <ul style="list-style-type: none"> Completes responses to customer complaints in required format Prepares reports using sequencing, format and words to communicate recommendations clearly and effectively |
| Planning and organising | <ul style="list-style-type: none"> Complies with organisational policies and procedures relevant to role Plans and implements systems to gather and organise information |

| Skill | Description |
|-----------------|---|
| Problem-solving | <ul style="list-style-type: none">• Uses problem solving skills to analyse and respond to customer complaints or enquiries |
| Teamwork | <ul style="list-style-type: none">• Selects and uses appropriate communication conventions to establish connections, build rapport, seek information and develop professional working relationships• Adjusts personal communication style in response to the opinions, values and particular needs of others |

Unit Mapping Information

Supersedes and is equivalent to BSBCUS301 Deliver and monitor a service to customers.

Supersedes but is not equivalent to:

- BSBCUE309 Develop product and service knowledge for customer engagement operation
- BSBEDU303 Assist with the provision of international education information
- BSBINT303 Organise the importing and exporting of goods
- BSBINT304 Assist in the international transfer of services
- BSBSLS407 Identify and plan sales prospects.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS304 Deliver and monitor a service to customers

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- deliver a service to at least three different customers, including:
 - using communication skills to establish rapport and build relationships with customers according to organisational requirements
 - identifying customer needs using appropriate questioning and active listening skills
 - providing customer service according to organisational requirements
 - responding to and recording customer feedback and action taken according to organisational standards, policies and procedures
 - producing a report which identifies and recommends ways to improve service delivery.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of customer service legislation and consumer law
- organisational policies and procedures relating to customer service, including complaints handling
- common forms of verifiable evidence that could be used to review customer satisfaction
- customer service standards and protocols for serving customers, including customers with specific needs.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- technology required to gather and provide information and assistance to customers

- workplace documents, and organisational policies and procedures relating to customer service
- examples of customer complaints and feedback.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS305 Process customer complaints

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to handle complaints from customers.

The unit applies to those who apply a broad range of competencies and may exercise discretion and judgement using appropriate knowledge of products, customer service systems and organisational policies to provide technical advice and support to a team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Receive complaints | 1.1 Assess complaint according to organisational policy 1.2 Inform relevant stakeholders that complaint has been received 1.3 Document customer complaints according to organisational policies and procedures |
| 2. Process complaints | 2.1 Identify complaints requiring escalation according to organisational policy, and escalate as required 2.2 Identify additional information requirements to resolve complaints that do not require escalation 2.3 Prepare information for resolving complaint |
| 3. Resolve complaints | 3.1 Identify implications of complaint for customer and organisation |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| | 3.2 Analyse options to resolve customer complaints according to legislation, organisational policies and codes of practice 3.3 Propose options according to legislative requirements and organisational policies 3.4 Escalate matters for which a solution cannot be determined to relevant personnel |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information to determine legislative, regulatory and organisational requirements |
| Writing | <ul style="list-style-type: none"> Documents complaints and actions taken according to organisational requirements Records spoken information clearly and accurately for future reference |
| Oral communication | <ul style="list-style-type: none"> Presents or requests information using words and non-verbal features appropriate to the audience and context Uses listening and questioning techniques to gather information and confirm understanding |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and completing tasks to achieve required outcomes Follows organisational communication practices and procedures when referring complaints, seeking advice or negotiating outcomes |
| Problem-solving | <ul style="list-style-type: none"> Addresses less predictable problems applying problem solving processes in determining solutions that meet organisational requirements |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBCMM301 Process customer complaints.

Supersedes but is not equivalent to:

- BSBCUE304 Provide sales solutions to customers

- BSBCUE308 Conduct outbound customer engagement.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS305 Process customer complaints

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- process at least three customer complaints relating to business operations.

In the course of the above, the candidate must:

- follow organisational procedures when referring and resolving complaints.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of legislation relating to customers including Australian Consumer Law and consumer guarantees
- communication techniques for handling customer complaints
- organisational policies, procedures and standards for processing complaints
- organisational escalation procedures and relevant personnel.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures relevant to customer complaints
- legislation and codes of practice relevant to customer complaints.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS306 Record stakeholder interactions

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to create a record of information in a customer management system (CMS) gathered from a stakeholder interaction as a result of an engagement activity.

The unit applies to those responsible for engaging with stakeholders for a range of purposes and in a range of contexts. It also applies to those who create a record of stakeholder interaction.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to record stakeholder interaction | 1.1 Collect information from stakeholder interaction 1.2 Review purpose of stakeholder interaction 1.3 Review information collected from stakeholder interaction. 1.4 Identify organisational policies and procedures and determine information to be included in record |
| 2. Create record of stakeholder interaction | 2.1 Enter details of stakeholder interaction in required CMS fields according to organisational policies, procedures and protocols 2.2 Check that collected information has been attributed to appropriate stakeholder in CMS |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 3. Finalise and review recording process | 3.1 Confirm that records represent stakeholder views, are free of bias and opinion, and comply with organisational requirements 3.2 Check completeness and discoverability of record 3.3 Complete required processes for finalising and saving created record in CMS according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information |
| Writing | <ul style="list-style-type: none"> Records spoken information clearly and accurately for future reference |
| Oral communication | <ul style="list-style-type: none"> Presents or requests information using words and non-verbal features appropriate to the audience and context Uses listening and questioning techniques to gather information and confirm understanding |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and completing tasks to achieve required outcomes Follows organisational communication practices and procedures |
| Problem-solving | <ul style="list-style-type: none"> Addresses less predictable problems applying problem solving processes in determining solutions that meet organisational requirements |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS306 Record stakeholder interactions

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- create a record of information collected from a stakeholder interaction in a Customer Management System (CMS) for at least three different stakeholder interactions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies, procedures and protocols for recording stakeholder interactions, including:
 - privacy and confidentiality protocols
 - procedures for recording details of stakeholder interaction in CMS
 - basic note taking methods, including using basic formatting
- basic business writing principles, including plain English principles
- key features of stakeholder interaction activities, including:
 - purpose of interaction
 - context of interaction
 - outcomes of interaction
- information that is relevant to stakeholder interaction purpose
- key features and functions of a CMS, including those relating to record saving.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- technology required to collect and record information
- workplace documents, and organisational policies and procedures relating to stakeholder interactions
- access to a CMS.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS401 Coordinate business resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to determine and analyse existing and required resources, their effective application and the accountability for their use.

The unit applies to individuals with a broad knowledge of business resources and well-developed skills to ensure adequate resources are available to perform the work of the organisation. They may have responsibility to provide guidance to, or delegate aspects of these tasks to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish required resources | 1.1 Identify resource requirements according to business and operational plans and organisational requirements 1.2 Create opportunities for individuals and workgroups to contribute to the identification of resource requirements 1.3 Assess proposed efficiency of resource expenditure according to budget resources 1.4 Present recommendations on resource requirements using business equipment and technology |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| 2. Acquire and allocate resources | 2.1 Acquire physical resources and services according to organisational requirements 2.2 Check resources and confirm quality and quantity are in line with service agreements 2.3 Allocate resources according to operational plans 2.4 Consult with individuals and teams on allocation of resources |
| 3. Evaluate resource allocation and usage | 3.1 Assess resource planning against actual costs, identified shortfalls and surpluses 3.2 Identify potential improvements in resource planning through consultation and feedback 3.3 Develop methods of monitoring and reporting resource use against business and operational plans |
| 4. Improve resource allocation and usage | 4.1 Implement improvements in resource planning according to organisational requirements 4.2 Implement identified methods of monitoring resource use 4.3 Maintain records concerning equipment and resource purchases according to organisational requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from organisational plans, policies and procedures |
| Writing | <ul style="list-style-type: none"> Develops a range of documents using structure and vocabulary appropriate to audience, context and purpose |
| Oral communication | <ul style="list-style-type: none"> Participates in spoken interactions using active listening and questioning to confirm and clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets a range of mathematical information that is embedded in familiar texts Calculates and compares numeric data to track expenditure |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies and responds to explicit and implicit organisational procedures and protocols and regulatory requirements |
| Teamwork | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role Cooperates with others as part of familiar routine activities playing an |

| Skill | Description |
|-------------------------|--|
| | active role in facilitating group interaction |
| Planning and organising | <ul style="list-style-type: none">• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints• Identifies and takes responsibility for addressing predictable problems in familiar work contexts• Assess impacts of variables on decision outcomes to identify improvement opportunities |
| Technology | <ul style="list-style-type: none">• Utilises a range of features within digital applications to access, store and share information |

Unit Mapping Information

Supersedes and is equivalent to BSBADM409 Coordinate business resources.

Supersedes but is not equivalent to:

- BSBADM301 Produce texts from shorthand notes
- BSBADM302 Produce texts from notes
- BSBADM303 Produce texts from audio transcription
- BSBADM401 Produce complex texts from shorthand notes
- BSBADM406 Organise business travel
- BSBADM411 Produce complex texts from audio transcription
- BSBCUE403 Schedule customer engagement activity.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS401 Coordinate business resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- coordinate at least three business resources.

In the course of the above, the candidate must:

- calculate and assess costs in relation to use and maintenance of business resources
- develop and present resource requirement recommendations
- consult and communicate with individuals and teams about acquiring and using resources
- monitor and assess resource acquisition, allocation, use and procedures
- follow organisational policies and procedures in relation to business resource acquisition and monitoring and maintaining records.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- functions of common business resources used in an organisation, including, organisational policies, plans and procedures in relation to business resource acquisition and monitoring
- method and format for developing recommendations on resource requirements
- organisational procedures for sourcing, assessing and costing business resources
- methods for analysing and incorporating feedback on effectiveness resource planning, monitoring resource use
- methods to implement organisational changes to resource planning and resource use.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- records concerning equipment and resource purchases
- organisational policies, procedures and operational plans.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS402 Coordinate business operational plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to implement operational plans by planning and acquiring resources, monitoring and adjusting operational performance and providing reports on performance, as required.

The unit applies to individuals who plan activities to achieve team and organisational objectives. At this level, work will normally be carried out within routine and non-routine methods and involve procedures that require planning, evaluation, leadership and guidance of others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to implement operational plan | 1.1 Consult with stakeholders to identify resource requirements relevant to operational plan 1.2 Collate, analyse and document details of resource requirements 1.3 Develop operational plan and determine implementation method 1.4 Plan for contingencies 1.5 Develop and present proposals for resource requirements |
| 2. Implement operational plan | 2.1 Assist in recruiting and onboarding employees required to implement operational plan according to organisational policies |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>and procedures</p> <p>2.2 Acquire physical resources and services according to organisational policies and procedures</p> <p>2.3 Support efficient, cost-effective and safe use of resources</p> <p>2.4 Adjust implementation of the operational plan in consultation with others to manage contingencies</p> |
| 3. Monitor operational performance | <p>3.1 Collate relevant information and determine operational and productivity performance</p> <p>3.2 Identify and use key performance indicators (KPIs) and assess operational performance</p> <p>3.3 Identify unsatisfactory performance and take action to rectify the situation according to organisational policies</p> |
| 4. Review operations based on performance | <p>4.1 Develop recommendations for variation to operational plans</p> <p>4.2 Present recommendations to the designated persons or groups to gain approval</p> <p>4.3 Maintain records related to operational performance according to organisational policies and procedures</p> <p>4.4 Report information on operational performance to management</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies, interprets, analyses and reviews textual information related to the operational plan and monitoring of operational performance |
| Writing | <ul style="list-style-type: none"> Communicates relationships between ideas and information, matching style of writing to purpose and audience Researches, plans and prepares workplace documentation for relevant stakeholders using organisational formats |
| Oral communication | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges with a range of audiences varying structure and language to suit the audience |
| Numeracy | <ul style="list-style-type: none"> Selects and uses familiar mathematical techniques to organise timely supply of adequate resources for the operational plan and to use budgetary information to monitor performance |
| Enterprise and initiative | <ul style="list-style-type: none"> Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment |

| Skill | Description |
|-------------------------|---|
| Teamwork | <ul style="list-style-type: none">• Selects and uses appropriate conventions and protocols when communicating with diverse individuals to build rapport, seek or present information• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group communication, influencing direction and taking a leadership role on occasion |
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning, organising, implementing and monitoring tasks required to achieve required outcomes• Evaluates effectiveness of decisions in terms of how well they met stated goals• Identifies and addresses an increasing range of familiar problems by implementing contingency plans |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBFLM305 Support operational plan
- BSBMGT402 Implement operational plan.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS402 Coordinate business operational plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare, implement and review two operational plans.

In the course of the above, the candidate must:

- interact with a range of people and groups to identify resource requirements, performance objectives, systems, procedures and records relating to the operational plan
- plan and acquire physical and human resources using organisation's systems and procedures
- manage and support personnel to achieve performance objectives including facilitating new employee onboarding
- present information and recommendations to support implementation and variation of the operational plan
- monitor operational performance against the performance objectives and budgets and implement improvements to rectify unsatisfactory performance
- vary the operational plan and gain approval to deal with contingencies
- document and provide reports on performance as required by the organisation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- processes to identify resource requirements
- sources of information to identify resource requirements
- methods to manage contingencies including through consultation with relevant stakeholders
- key features of performance monitoring systems and processes
- common methods for problem solving
- methods to support staff including mentoring, coaching and supervision

- implementation methods for operational plan
- budget and other financial information related to the organisation
- organisational objectives including costs, identified shortfalls and surpluses.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational operational plans, policies and procedures relevant to performance evidence
- workplace documentation and resources including budgets
- physical and human resource procurement documentation
- employee onboarding and performance monitoring procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS403 Apply business risk management processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify business risks and to apply established risk management processes to a defined area of operations that are within the responsibilities and obligations of the work role.

The unit applies to individuals with a broad knowledge of risk analysis or project management who contribute well developed skills in creating solutions to unpredictable problems through analysis and evaluation of information from a variety of sources. They may have responsibility to provide guidance or delegate aspects of these tasks to others. Risks applicable to own work responsibilities and area of operation may include projects being undertaken individually or by a team, or operations within a section of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify risks | 1.1 Identify context for risk management 1.2 Undertake required steps to identify risks 1.3 Document identified risks according to relevant policies, procedures, legislation and standards |
| 2. Analyse and evaluate risks | 2.1 Analyse risks in consultation with relevant stakeholders 2.2 Undertake risk categorisation and determine level of risk 2.3 Document analysis processes and outcomes |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 3. Treat risks | 3.1 Identify control measures for risks 3.2 Assess strengths and weaknesses of control measures 3.3 Refer risks to relevant personnel, where required, according to policies and procedures 3.4 Select and implement control measures for personal area of operation and responsibilities |
| 4. Monitor and review effectiveness of risk treatments | 4.1 Review implemented treatments against measures of success 4.2 Use review results to improve the treatment of risks 4.3 Monitor and review management of risk in personal area of operation |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Learning | <ul style="list-style-type: none"> • Uses analysis and consultative processes to inform decisions about selection and implementation of risk control measures • Evaluates effectiveness of plans and results to inform improvement decisions |
| Reading | <ul style="list-style-type: none"> • Comprehends documents and texts of varying complexity to extract and analyse relevant information |
| Writing | <ul style="list-style-type: none"> • Uses specific, industry related terminology and logical organisational structure in workplace documents that identify and analyse risk and report management process outcomes |
| Oral communication | <ul style="list-style-type: none"> • Participates effectively in interactions with stakeholders by using questioning and listening to elicit opinions and clarify understanding |
| Numeracy | <ul style="list-style-type: none"> • Uses numerical tools to assess risk and uses numerical data to review plans |
| Enterprise and initiative | <ul style="list-style-type: none"> • Complies with organisational and legislative requirements • Takes responsibility for identification and management of risk within own work context and refers matters to others as required |
| Teamwork | <ul style="list-style-type: none"> • Selects appropriate communication protocols and conventions when conferring with others to establish risk management requirements |
| Planning and organising | <ul style="list-style-type: none"> • Determines job sequence and works logically and systematically to undertake defined tasks |

| Skill | Description |
|------------|---|
| Technology | <ul style="list-style-type: none">• Uses familiar digital technologies and systems to access information, prepare plans and communicate with others |

Unit Mapping Information

Supersedes and is equivalent to BSBRSK401 Identify risk and apply risk management processes.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS403 Apply business risk management processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to apply organisational policies, procedures and processes to:

- treat at least three risks by:
 - identifying different types of organisational risks
 - consulting with stakeholders to analyse and evaluate risks
 - implementing control measures
 - referring risks that are beyond own area of responsibility to others
 - maintaining risk management documentation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory context of the organisation in relation to risk management
- techniques for identifying and evaluating risks
- organisational policies and procedures for risk management
- areas where risks are commonly identified in an organisation
- risks beyond scope of individual responsibility to be referred to relevant organisational personnel
- purpose and key elements of current risk management standards.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relating to business risk

- workplace documentation on selected organisational risks.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS404 Implement customer service strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to advise, carry out and evaluate customer service strategies.

The unit applies to individuals who have well developed skills and a broad knowledge of customer service strategies for addressing customer needs and problems. Individuals may provide guidance or delegate work related tasks to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Advise on customer service needs | 1.1 Identify organisational customer service objectives and customer needs 1.2 Assess and clarify customer requirements 1.3 Identify and diagnose problems with service delivery 1.4 Develop options to improve customer service delivery according to organisational requirements 1.5 Provide recommendations to promote improvement of customer service delivery |
| 2. Support implementation of customer service | 2.1 Consult with relevant stakeholders to develop customer service strategies 2.2 Assess customer service strategies and opportunities against |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| strategies | customer service objectives 2.3 Identify and allocate available budget resources to fulfil customer service objectives 2.4 Action procedures to resolve customer difficulties and complaints according to organisational requirements |
| 3. Evaluate and report on customer service | 3.1 Review stakeholder satisfaction with service delivery according to organisational requirements 3.2 Identify and report changes necessary to meet customer service objectives 3.3 Prepare conclusions and recommendations on future directions of client service strategies 3.4 Monitor systems, records and reporting procedures for changes to customer satisfaction |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Reviews textual information and comprehends details that relate to the interests or requirements of the client and organisation |
| Writing | <ul style="list-style-type: none"> Creates a range of formal texts using structure, grammar and clear and specialised language to describe customer needs, maintain information and support a particular position |
| Oral communication | <ul style="list-style-type: none"> Uses pace, intonation, intelligible pronunciation and listening and questioning techniques to interact effectively with others |
| Numeracy | <ul style="list-style-type: none"> Recognises and interprets numerical information and performs calculations on familiar mathematical information |
| Enterprise and Initiative | <ul style="list-style-type: none"> Recognises and applies organisational protocols and meets expectations associated with own work |
| Teamwork | <ul style="list-style-type: none"> Uses a range of strategies to establish a sense of connection and build rapport with customers Collaborates with others contributing knowledge and skills to achieve joint outcomes |
| Planning and organising | <ul style="list-style-type: none"> Applies formal and logical processes when planning and implementing tasks Applies standard procedures when responding to familiar problems |

| Skill | Description |
|------------|---|
| | within own work context |
| Technology | <ul style="list-style-type: none">• Uses digital technologies to access, organise, present and store information relevant to own role |

Unit Mapping Information

Supersedes and is equivalent to BSBCUS401 Coordinate implementation of customer service strategies.

Supersedes but is not equivalent to:

- BSBCUS402 Address customer needs
- BSBCUS403 Implement customer service standards
- BSBSLS408 Present, secure and support sales solutions.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS404 Implement customer service strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement at least two strategies to improve customer service delivery.

In the course of the above, the candidate must:

- respond to and report on customer feedback and complaints
- review client satisfaction using verifiable data
- consult and communicate effectively with relevant people
- develop and implement strategies and methods to improve customer service delivery, including:
 - budgeting
 - promotion to staff
 - documentation and follow up.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- customer communication techniques
- principles of customer service
- sources of verified client information
- techniques for identifying customer needs and reviewing customer satisfaction
- organisational business structure, products and services related to customer service
- techniques for drawing insights from verifiable evidence to develop recommendations and conclusions
- product and service standards and best practice models.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures for customer service
- examples of customer complaints and feedback
- client satisfaction data.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS405 Organise business meetings

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to organise meetings including making arrangements, liaising with participants, and developing and distributing meeting related documentation.

The unit applies to those employed in a range of work environments who are required to organise a variety of business meetings. They may provide administrative support within an enterprise or have responsibility for these tasks in the context of a particular team, workgroup or project.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare meeting documentation and details | 1.1 Identify type and purpose of meeting being organised 1.2 Identify and comply with legal, ethical and organisational requirements for business meetings 1.3 Make meeting arrangements according to meeting and participants requirements 1.4 Prepare notice of meeting, agenda and meeting papers according to organisational requirements 1.5 Distribute documentation and meeting details to participants within designated timelines |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------|---|
| | 1.6 Confirm presence of required resources prior to meeting commencement |
| 2. Record meeting outcomes | 2.1 Take notes of the meeting 2.2 Outline key decisions and actions for implementation 2.3 Review minutes for accuracy and submit for approval by the nominated person 2.4 Distribute relevant post-meeting materials to attendees within designated timelines |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from instructions, organisational policies and procedures, or legislation Compares final output with original notes to check accuracy |
| Writing | <ul style="list-style-type: none"> Prepares complex texts from notes using appropriate structure, accurate spelling, grammar and punctuation Records notes of meeting proceedings according to organisational requirements Edits and corrects own work to ensure accuracy |
| Oral communication | <ul style="list-style-type: none"> Listens for specific information during meetings Conveys specific instructions using vocabulary appropriate to context, purpose and audience Asks questions and listens to responses to clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Performs calculations required to measure output against predetermined timeframes |
| Initiative and enterprise | <ul style="list-style-type: none"> Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative/regulatory requirements |
| Teamwork | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Planning and organising | <ul style="list-style-type: none"> Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints |
| Technology | <ul style="list-style-type: none"> Understands the purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete routine tasks |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBADM405 Organise meetings
- BSBADM503 Plan and manage conferences.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS405 Organise business meetings

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- organise business meetings, prepare agenda and take notes on at least two occasions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- relevant communication techniques
- common formats for agendas and minutes
- organisational policies and procedures relating to facilitation of meetings, including
 - meeting quorums
 - required notice periods
 - meeting resolutions and storage of minutes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures for meetings.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS406 Participate in organisational governance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to meet the diverse roles, responsibilities, codes of conduct and behavioural protocols required of individuals involved in organisational governance.

The unit applies to individuals responsible for monitoring and guiding the activities of their organisation or work area.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify roles within an organisation | 1.1 Identify core functions and structure of organisation 1.2 Describe relationships between organisation, its stakeholders and other organisations or entities 1.3 Assess the relationships and overlapping roles between committee and board members, and staff within an organisation 1.4 Identify differences between roles of governance and management |
| 2. Work within structure of the organisation | 2.1 Perform designated governance duties 2.2 Follow agreed decision making processes 2.3 Manage real and perceived conflict of interest issues associated |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|--|
| | with competing roles and responsibilities 2.4 Follow confidentiality policies, procedures and requirements |
| 3. Follow legal requirements | 3.1 Comply with legislative requirements that apply to organisational governance duties 3.2 Comply with relevant aspects of corporation law and terms and conditions of funding agreements 3.3 Adhere to the constitution of the organisation while undertaking workplace responsibilities |
| 4. Monitor operations | 4.1 Identify and analyse outcomes for each operational area 4.2 Use information provided to review effectiveness and efficiency of operations and associated policy 4.3 Suggest changes to operations or policy, where required |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses information relating to core functions of the organisation, such as organisational goals, standards and values |
| Writing | <ul style="list-style-type: none"> Develops material for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations |
| Oral communication | <ul style="list-style-type: none"> Participates in a verbal exchange of ideas and clearly articulates requirements using language, tone and syntax appropriate to audience and environment Uses active listening and questioning skills to confirm understanding |
| Enterprise and initiative | <ul style="list-style-type: none"> Understands nature and purpose of own role and associated responsibilities and how it contributes to the work of others in immediate work context Adheres to legal and regulatory responsibilities related to own work Recognises and follows explicit and implicit protocols and meets expectations associated with own role |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating group interaction, influencing direction and taking a leadership role on occasion Follows accepted communication practices and protocols, adjusting personal communication style in response to the values, beliefs and cultural expectations of others |

| Skill | Description |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning and organising own workload, identifying ways of sequencing and combining elements for greater efficiency and considering how to link to work of others• Takes responsibility for outcomes of routine decisions related to own role |
| Problem solving | <ul style="list-style-type: none">• Understands when to take responsibility for solving problems and when to consult with others |

Unit Mapping Information

Supersedes and is equivalent to BSBGOV405 Undertake the roles and responsibilities of committee or board members.

Supersedes but is not equivalent to:

- BSBGOV401 Implement board member responsibilities
- BSBGOV402 Work within organisational structure
- BSBGOV501 Review and apply the organisation's constitution
- BSBGOV502 Recruit and coordinate committee members
- BSBGOV505 Seek and apply for funding opportunities.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS406 Participate in organisational governance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- participate in at least three organisational governance activities, including:
 - identifying core functions and structure of organisation
 - describing relationships between organisation, its stakeholders and other organisations or entities
 - following legal requirements and organisational policies and procedures
 - managing conflicts of interest
 - monitoring operations and analysing outcomes of operational area.

In the course of the above, the candidate must:

- communicate with others to achieve organisational objectives
- recommend operational process improvements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures for addressing conflicts of interest
- confidentiality requirements related to organisational governance
- relevant corporation laws related to funding agreements
- terms and condition of funding agreements
- decision-making techniques
- governance and management roles and responsibilities within organisation
- legislation and funding arrangements or funding body requirements relevant to own role.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS501 Manage business resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage resources according to planned business strategies. It includes analysing resource requirements, developing resource plans, allocating resources, and reviewing and reporting on resource usage.

The unit applies to individuals with a role in allocating and monitoring the use of physical and/or human resources to meet defined business objectives.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Analyse resource requirements | 1.1 Develop resource bids according to required outputs specified in business plans 1.2 Consult with relevant stakeholders and determine the nature and level of resources required 1.3 Analyse resource requirements and identify proposed costs and benefits 1.4 Identify opportunities to share resources across business units within the organisation |
| 2. Develop resource plans | 2.1 Determine internal resourcing capabilities and external resourcing requirements 2.2 Develop procedures for the evaluation of resource allocation |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | <p>and incorporate them in resource plans</p> <p>2.3 Identify risks and establish risk management processes</p> <p>2.4 Obtain required approvals from relevant personnel</p> |
| 3. Allocate resources | <p>3.1 Identify and adhere to organisational policies and procedures for resource allocation</p> <p>3.2 Manage resource allocation according to business unit objectives</p> <p>3.3 Negotiate and obtain resources within required timeframe according to business unit objectives</p> <p>3.4 Develop and implement systems for monitoring resource usage</p> |
| 4. Review and report on resource usage | <p>4.1 Develop and implement procedures to review resource allocation against business unit objectives</p> <p>4.2 Suggest improvements to work practices for the efficient use of resources</p> <p>4.3 Monitor compliance with program and project budgets and take corrective action where necessary</p> <p>4.4 Prepare report that indicates the level of performance achieved and any action taken to adjust or rectify procedures in meeting service and product delivery standards</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets textual information including legislation and organisational policy, to plan, implement and review resource requirements Analyses organisational information to assess resource usage practices |
| Writing | <ul style="list-style-type: none"> Develops organisational texts including proposals, reports and plans according to organisational requirements |
| Oral communication | <ul style="list-style-type: none"> Participates in spoken exchanges with stakeholders using structure and language appropriate to context and audience |
| Numeracy | <ul style="list-style-type: none"> Selects and uses familiar mathematical techniques to determine costs and benefits associated with strategic resource decisions Defines timeframes according to schedule requirements Selects and uses familiar mathematical techniques to organise timely supply of required resources as well as identify budgetary information |

| Skill | Description |
|---------------------------|---|
| | and monitor performance |
| Enterprise and initiative | <ul style="list-style-type: none">• Contribute to the development of organisational policies and procedures• Adheres to legal requirements and organisational policies and procedures |
| Teamwork | <ul style="list-style-type: none">• Collaborates and negotiates with others to achieve required outcomes |
| Planning and organising | <ul style="list-style-type: none">• Accepts responsibility for planning and sequencing complex tasks to achieve organisational requirements• Develops plans and systems to manage resource allocation• Systematically gathers and analyses all relevant information, evaluates options and conducts reviews to inform recommendations about resource usage improvements |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT622 Manage resources.

Supersedes but is not equivalent to:

- BSBADM506 Manage business document design and development
- BSBCUE406 Run a multicentre
- BSBCUE502 Establish a multicentre
- BSBCUE607 Manage customer engagement centre staffing
- BSBCUE608 Manage customer engagement operational costs.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS501 Manage business resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, implement and review at least three resource plans.

In the course of the above, the candidate must:

- consult with stakeholders and analyse information to determine the nature and level of resources required to achieve business objectives
- plan for, acquire and allocate the resources, incorporating strategies to maximise efficiency and manage risk
- develop and implement systems to:
 - incorporate efficient use of resources into work practices
 - monitor resource use against budgets and business objectives
- prepare a report that indicates the level of performance achieved and any adjustments needed to achieve service and product delivery standards.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory context of the organisation in relation to managing resources
- contents of resource plans including:
 - acquisition and allocation of resources
 - timelines and the relationship to business strategies
 - contingency plans and processes
 - costs and budgets
- resource acquisition processes
- managing finance, including project budgets
- resource allocation review procedures

- objectives of business unit
- typical risks associated with managing business resources and risk management strategies
- procedures for risk management, including requirements for the consideration of potential changes in government priorities
- key elements and sources of information required to monitor usage of:
 - physical resources
 - human resources.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation, regulations, standards and codes
- workplace documentation and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS502 Manage business operational plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and monitor the implementation of operational plans to support efficient and effective workplace practices and organisational productivity and profitability.

The unit applies to individuals who manage the work of others and operate within the parameters of a broader strategic and/or business plans.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish operational plan | 1.1 Research, analyse and document resource requirements 1.2 Develop operational plan in consultation with, and with approval from, relevant stakeholders 1.3 Develop contingencies for operational plan 1.4 Explain plan to relevant work teams |
| 2. Manage resource acquisition | 2.1 Confirm that employees are recruited and inducted according to the organisation's human resources management policies, practices and procedures 2.2 Confirm that physical resources and services are acquired according to the organisation's policies, practices and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.3 Identify and incorporate requirements for intellectual property rights and responsibilities related to acquisition of resources |
| 3. Monitor and review operational performance | 3.1 Assess progress of operational plan in achieving profit and productivity plans and targets 3.2 Identify areas of under-performance, recommend solutions and rectify the situation 3.3 Plan and implement relevant processes for ongoing monitoring and confirm that support is provided for individuals and teams 3.4 Negotiate recommendations for variations to operational plans and gain approval from designated persons |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses workplace documentation to determine requirements for the operational plan |
| Writing | <ul style="list-style-type: none"> Develops and documents a range of detailed texts relating to the management of an operational plan according to organisational requirements |
| Oral communication | <ul style="list-style-type: none"> Presents information to a range of audiences using appropriate register, vocabulary and paralinguistic features Listens and comprehends information from a variety of spoken exchanges with clients, co-workers and other stakeholders |
| Numeracy | <ul style="list-style-type: none"> Selects and uses mathematical problem-solving strategies to organise resource requirements, performance benchmarks and financial viability of the operational plan |
| Enterprise and initiative | <ul style="list-style-type: none"> Monitors adherence to organisational policies, procedures and considers own role in terms of its contribution to broader goals of the work environment |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for developing and implementing systems and processes to achieve organisational objectives, seeking advice, feedback and support as required to assist in the development and planning phase Sequences and schedules complex activities, monitors |

| Skill | Description |
|-----------------|--|
| | implementation, and manages relevant communication |
| Problem solving | <ul style="list-style-type: none">• Uses systematic analytical processes to aid decision making, identify potential problems and generate contingency plans or solutions |
| Technology | <ul style="list-style-type: none">• Demonstrates awareness of the importance of data security in a digital environment |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT517 Manage operational plan.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS502 Manage business operational plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage an operational plan for at least one business or work area.

In the course of the above, the candidate must:

- develop and implement an operational plan using a variety of information sources and consultation including:
 - resource requirements
 - key performance indicators
 - monitoring processes
 - contingency plans
- communicate with stakeholders to explain the plan and supporting information, seek approvals, negotiate variations and engage work teams
- confirm existence of relevant strategies, including strategies relating to:
 - recruiting, inducting and developing personnel
 - acquiring physical resources and services
 - protecting intellectual property
 - making variations to the plan
 - monitoring and documenting performance.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- stakeholders involved in development and management of operations plan including escalation points, colleagues and specialist resource managers
- key information sources for proposal development and presentation including resource requirement specialists

- consultation processes
- content of operational plans, including:
 - procurement processes
 - employee recruitment and induction strategies
 - physical resource and service acquisition strategies
 - key indicators of organisational performance
- budget and actual financial relating to profit and productivity
- methods for preparing operational plans and contingency plans
- role of an operational plan in achieving an organisation's objectives
- procedures and records associated with documenting performance
- approaches for developing key performance indicators to meet business objectives
- legislative and regulatory framework relating to the development and implementation of operational plan of the organisation, including:
 - fair trading laws
 - work health and safety
- organisational policies, practices and procedures that relate to the operational plan.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation and regulations relevant to operational plans
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS503 Develop administrative systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan for or review the requirements of administrative systems and procedures for implementing, monitoring and reviewing the system.

The unit applies to individuals employed in a range of work environments in senior administrative roles.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan administrative system | 1.1 Identify requirements for update to the administrative system according to organisational and budgetary requirements 1.2 Consult with stakeholders and verify identified requirements and modifications 1.3 Obtain quotations from suppliers or developers to address system requirements according to organisational policy and procedures 1.4 Select supplier or developer according to organisational policies and procedures |
| 2. Implement administrative system | 2.1 Identify and develop implementation strategies in consultation with staff |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|--|
| | 2.2 Implement system according to organisational and legislative requirements 2.3 Support staff and provide training on the use of the system 2.4 Manage contingencies and support minimal impact on users |
| 3. Monitor administrative system | 3.1 Monitor system for usage, security and output according to organisational requirements 3.2 Modify system to meet changing needs according to organisational requirements 3.3 Identify further modifications and notify users |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|--|
| Learning | <ul style="list-style-type: none"> Reinforces own knowledge and skills by training and mentoring others |
| Reading | <ul style="list-style-type: none"> Extracts, analyses and evaluates information from complex texts, including organisational policies and procedures |
| Writing | <ul style="list-style-type: none"> Creates instructional texts using grammatical structures and vocabulary appropriate to audience and context |
| Oral communication | <ul style="list-style-type: none"> Presents complex information adjusting presentation style and vocabulary to suit the audience |
| Numeracy | <ul style="list-style-type: none"> Recognises and interprets numerical information related to budgets |
| Enterprise and initiative | <ul style="list-style-type: none"> Develops systems to meet organisational and legislative requirements Anticipates potential problems and implements contingency plans as soon as warning signs are recognised |
| Teamwork | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role Collaborates with others to achieve joint outcomes, providing guidance to others where necessary |
| Planning and organising | <ul style="list-style-type: none"> Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints Monitors progress of plans and changes them to meet new demands or priorities |

| Skill | Description |
|------------|--|
| Technology | <ul style="list-style-type: none">• Uses and investigates new digital technologies and applications to manage and manipulate data• Demonstrates awareness of the importance of data security in a digital environment |

Unit Mapping Information

Supersedes and is equivalent to BSBADM504 Plan and implement administrative systems.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS503 Develop administrative systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least one administrative system.

In the course of the above, the candidate must:

- work with relevant personnel and stakeholders to identify administrative system improvements
- document requirements
- provide training and support for staff to use the system
- monitor the new system and identify future improvements and staff training needs.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and organisational policies and procedures for reviewing administrative systems
- stakeholders involved in organisational administrative systems including system users
- training procedures for communicating new system information to staff.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policy and procedure manuals relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS504 Manage business risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to manage business risks in a range of contexts across an organisation or for a specific business unit or area in any industry setting.

The unit applies to individuals who are working in positions of authority and who are approved to implement change across the organisation, business unit, program or project area. They may or may not have responsibility for directly supervising others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish risk context | 1.1 Evaluate organisational processes, procedures and requirements and determine scope for risk management process 1.2 Review strengths and weaknesses of existing arrangements 1.3 Document critical success factors, goals and objectives for area included in scope 1.4 Communicate risk management process to relevant stakeholders |
| 2. Identify risks | 2.1 Invite stakeholders to assist in the identification of risks 2.2 Research risks that may apply to scope 2.3 Document risks that apply to the scope, in consultation with relevant parties |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|---|
| 3. Analyse risks | 3.1 Assess likelihood of risks occurring 3.2 Assess impact or consequence if risks occur 3.3 Evaluate and prioritise risks for treatment |
| 4. Select and implement treatments | 4.1 Determine and select from options for treating risks 4.2 Develop action plan for implementing risk treatment 4.3 Communicate risk management processes to relevant parties 4.4 Implement action plan according to organisational policies and procedures 4.5 Monitor and evaluate risk management process |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Synthesises a variety of relatively complex texts Gathers, interprets and analyses textual information from a range of sources to identify relevant information |
| Writing | <ul style="list-style-type: none"> Develops textual material and organises content in a manner that effectively documents risk management analysis and assessment priorities and processes |
| Oral communication | <ul style="list-style-type: none"> Participates in interactions with stakeholders using questioning and listening to elicit opinions, and to confirm and clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Uses numerical tools to assess risk and uses numerical data to review plans |
| Teamwork | <ul style="list-style-type: none"> Selects appropriate conventions and protocols when communicating with stakeholders about risk management Consults and negotiates with stakeholders about risk management processes and outcomes |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules a range of routine and complex activities, monitors implementation, evaluates processes and manages relevant communication Systematically analyses information to decide on appropriate risk management treatments Refers to organisational processes, procedures and requirements when making decisions about risk management |
| Technology | <ul style="list-style-type: none"> Uses digital technologies and systems to access information, |

| Skill | Description |
|-------|--|
| | document plans and communicate with others |

Unit Mapping Information

Supersedes and is equivalent to BSBR501 Manage risk.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS504 Manage business risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead at least one risk management process for an organisation or work area.

In the course of the above, the candidate must:

- analyse information from a range of sources to identify the scope and context of the risk management process, including:
 - stakeholder analysis
 - political, economic, social, legal, technological and policy context
 - current arrangements
 - objectives and critical success factors for the area included in scope
 - risks that may apply to scope
- consult and communicate with stakeholders to identify and assess risks, determine appropriate risk treatment actions and priorities and explain the risk management processes
- develop and implement an action plan to treat risks
- monitor and evaluate the action plan and risk management process
- maintain documentation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory context of the organisation in relation to risk management
- organisational policies, procedures and processes for risk management, including document storage
- types of business risks
- options for treating risks
- risk management process
- purpose and key elements of current risk management standards

- tools and techniques to identify risks to scope risk management processes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relating to risk management
- workplace documentation and resources relating to risk management.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS505 Manage organisational customer service

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop strategies to manage organisational systems that ensure products and services are delivered and maintained to standards agreed by the organisation.

The unit applies to individuals who supervise customer service provided by others within an organisation. At this level, individuals must exercise considerable discretion and judgement, using a range of problem solving and decision making strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish customer requirements | 1.1 Consult with customers to identify customer service requirements 1.2 Integrate customer feedback into organisation's business plan 1.3 Identify and procure resources required to address customer service requirements |
| 2. Deliver quality products and services | 2.1 Deliver product and service according to customer specifications within organisation's business plan 2.2 Monitor team performance and assess against the organisation's quality and delivery standards 2.3 Support colleagues to overcome difficulties in meeting |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|--|
| | customer service standards |
| 3. Evaluate customer service | 3.1 Develop and use strategies for monitoring progress against product and service targets and standards 3.2 Develop and use strategies for obtaining customer feedback on provision of product and service 3.3 Adapt delivery of customer product and service in consultation with relevant individuals and groups 3.4 Manage records, reports and recommendations within the organisation's systems and processes |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses textual information from a variety of sources and applies the knowledge that has been gained to evaluate standards for organisation's products and services |
| Writing | <ul style="list-style-type: none"> Produces a range of text types to convey information, requirements or recommendations matching style of writing to purpose and audience |
| Oral communication | <ul style="list-style-type: none"> Clearly articulates systems and standards in a team environment using language suitable to diverse audiences Uses listening and questioning techniques to obtain feedback and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets and comprehends mathematical information in organisation's business and customer service plans |
| Planning and organising | <ul style="list-style-type: none"> Recognises and applies organisational protocols and meets expectations associated with own work |
| Teamwork | <ul style="list-style-type: none"> Identifies and uses appropriate conventions and protocols when communicating with colleagues and customers Collaborates with others, taking into account their strengths and experience, to achieve desired outcomes Provides support in field of expertise to team |
| Enterprise and initiative | <ul style="list-style-type: none"> Develops and implements plans using logical processes and monitors and evaluates progress against stated goals |
| Problem solving | <ul style="list-style-type: none"> Accepts responsibility for addressing complex or non-routine difficulties, applying problem solving processes in determining a |

| Skill | Description |
|------------|---|
| | solution |
| Technology | <ul style="list-style-type: none">• Uses digital technology to access, organise and present information in a format that meets requirements |

Unit Mapping Information

Supersedes and is equivalent to BSBCUS501 Manage quality customer service.

Supersedes but is not equivalent to:

- BSBCUE504 Integrate customer engagement within the organisation
- BSBCUE601 Optimise customer engagement operations
- BSBCUE602 Manage customer engagement information
- BSBCUE603 Design and launch new customer engagement facilities
- BSBSLS501 Develop a sales plan.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS505 Manage organisational customer service

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and review strategy for delivering and monitoring quality customer service for an organisation or work area.

In the course of the above, the candidate must:

- implement quality customer service policies and procedures
- identify and resolve system problems relating to poor customer service
- assist teams to meet customer service requirements
- develop, procure and use human and physical resources to support quality customer service delivery.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory frameworks governing customer service
- elements of effective customer service including quality, time and cost
- organisational policies and procedures for customer service and handling customer complaints
- relevant service standards and best practice models
- key principles of public relations and product promotion
- common techniques for solving complaints
- principles and techniques involved in managing:
 - customer behaviour
 - specific customer needs
 - customer research
 - customer relations

- ongoing product and service quality
- problem identification and resolution
- quality customer service delivery
- record keeping and management methods
- strategies for monitoring, managing and introducing ways to improve customer service relationships
- strategies to obtain customer feedback.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations and codes of practice related to customer service
- workplace documentation and resources
- complex customer complaints.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS601 Develop and implement business plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead a business operation that covers the steps required to develop and implement business plans.

The unit applies to individuals who are running an organisation or who take a senior role in determining the effective functioning and success of the organisation. These individuals may oversee the work of a number of teams and other managers.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish business plan | <ul style="list-style-type: none">1.1 Identify organisational and legislative frameworks relevant to development of a business plan1.2 Review market requirements for the organisation's products and service1.3 Identify and assess business requirements, objectives, competitors and established plans1.4 Develop performance objectives and measures for business plan, in consultation with relevant stakeholders1.5 Identify financial, human and physical resource requirements for the business1.6 Develop business plan |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|---|
| 2. Implement business plan | 2.1 Communicate business plan to all relevant stakeholders 2.2 Confirm skilled labour is available to implement plan 2.3 Test performance measurement systems and refine, where required 2.4 Prepare reports on key aspects of the business 2.5 Report system failures, product and service failures and variances to the business plan as they occur |
| 3. Respond to performance data | 3.1 Analyse performance reports against planned objectives 3.2 Review performance indicators and refine, where required 3.3 Identify and coach under-performing staff 3.4 Establish ongoing review processes |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Gathers, interprets and analyses textual information when developing the business plan and monitoring operational performance |
| Writing | <ul style="list-style-type: none"> Communicates relationships between ideas and information, matching style of writing to purpose and audience Researches, plans and prepares business plan for relevant stakeholders |
| Oral communication | <ul style="list-style-type: none"> Presents information and seeks advice using language and features appropriate to audience Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Extracts and evaluates mathematical information to review the market, research competitors and review pricing structures |
| Enterprise and initiative | <ul style="list-style-type: none"> Takes full responsibility for identifying and complying with legislative requirements applicable to self and the organisation |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role Provides support in field of expertise to colleagues, as required |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules complex activities, monitors implementation and manages relevant communication Systematically gathers and analyses all relevant information and |

| Skill | Description |
|-------|--|
| | evaluates options in order to monitor performance and identify opportunities for improvement |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT617 Develop and implement a business plan.

Supersedes but is not equivalent to:

- BSBCUE604 Develop and maintain a service level strategy
- BSBCUE606 Forecast and plan using customer engagement traffic information analysis
- BSBMGT618 Develop an engagement centre business plan.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS601 Develop and implement business plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement at least one business plan.

In the course of the above, the candidate must:

- analyse and research business vision, mission, values, objectives, goals, competitors, financial targets, management arrangements and marketing approaches
- write a business plan, including:
 - description of the business
 - products and services
 - financial, physical and human resource requirements
 - regulatory requirements
 - marketing strategy
 - financial indicators
 - productivity and performance targets for key result areas
- monitor and respond to business performance including evaluation of performance against key results indicators
- consult, communicate with and report to relevant stakeholders
- provide analysis of the strengths and weaknesses of a business plan.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational and legislative frameworks required for the development of business plans, including:
 - pre-existing strategic, business and operational plans
 - business vision, mission, values and objectives

- permits or licences that may be required for new activity
- processes for developing and monitoring business plans
- customer needs and budgeting information
- performance objectives and measures, including key results indicators
- stakeholders involved in the development of business plans.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- business information and data relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBOPS602 Monitor corporate governance activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and implement procedures to ensure the organisation meets its corporate governance obligations. It covers researching corporate governance trends, standards and practices, and establishing processes to promote compliance. It also includes reviewing compliance and taking corrective action on non-compliance.

The unit applies to those who are responsible for monitoring and managing compliance to corporate governance requirements.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Business Operations

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan corporate governance activities | 1.1 Identify corporate governance requirements, standards and practices according to organisational requirements 1.2 Develop processes for monitoring performance of organisation's corporate governance activities 1.3 Research governance audit reports and practices and identify methodologies and recommendations for implementation |
| 2. Monitor performance of corporate governance activities | 2.1 Analyse the organisation's governance reports, returns and review processes 2.3 Develop and update management processes for corporate |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | governance 2.3 Establish reporting plans and confirm organisation meets compliance and reporting deadlines |
| 3. Review corporate governance activities | 3.1 Evaluate organisational adherence to requirements, standards and practices 3.2 Monitor compliance performance indicators 3.3 Identify non-compliances and causes, and implement corrective actions, where required |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Sources and researches textual information in the context of organisational strategy and compliance requirements to support plans, monitoring and reporting |
| Writing | <ul style="list-style-type: none"> Develops complex texts using specialised and detailed language to convey information, requirements and recommendations according to legal and organisational requirements |
| Enterprise and initiative | <ul style="list-style-type: none"> Leads in the development of organisational policies, procedures to support adherence to legal and statutory requirements |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for developing and implementing systems and processes to achieve organisational objectives, seeking advice and feedback as required Monitors and evaluates performance against agreed benchmarks to ensure compliance with governance, statutory and legal requirements |
| Self-management | <ul style="list-style-type: none"> Acknowledges own role in terms of its contribution to broader goals of the organisation |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBGOV506 Manage advocacy for your organisation
- BSBGOV507 Manage board or committee and organisational conflict
- BSBMGT623 Monitor corporate governance activities.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS602 Monitor corporate governance activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, implement, monitor and review corporate governance on at least one occasion.

In the course of the above, the candidate must:

- access and interpret legislation and regulations to identify corporate governance compliance requirements
- research and analyse information to identify trends in corporate governance practices and reporting
- establish and implement processes for corporate governance adherence, including determining corporate governance indicators and establishing a reporting plan
- meet statutory reporting requirements
- monitor compliance and analyse the causes of non-compliances including analysing governance reports, returns, review processes and the information technology system
- identify and implement corrective actions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, regulations and statutory requirements and standards that relate to corporate governance obligations for the organisation, including:
 - finances and taxation
 - industrial relations, equal opportunity, employment records and superannuation
 - intellectual property
 - corporate entities
 - competition, ethical practice and consumer rights
 - work health and safety
 - information technology systems and data recording

- emerging trends and interpretations of statutory and other regulatory requirements
- principles of internal control, including statutory requirements
- statutory reporting requirements
- principles of valuation and apply common methods of depreciation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations, standards and codes relevant to corporate governance
- workplace documentation and resources relevant to performance evidence, including governance reports and returns.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF101 Plan and prepare for work readiness

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify and document current skills and plan future skills development with support and supervision.

It applies to those who are preparing to work in a broad range of settings.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Seek advice on future work goals | 1.1 Identify possible work progression in industry or organisation 1.2 Identify and prioritise personal work goals 1.3 Identify additional skill requirements for future work progression with supervisor 1.4 Identify influence of personal values and attitudes regarding work in planning future work progression 1.5 Research methods to acquire additional skills required |
| 2. Assess own skills | 2.1 Assess current skills, knowledge and attitudes against competencies for work goals 2.2 Discuss results of self-assessment with supervisor 2.3 Seek advice on further skills development needs |
| 3. Prepare portfolio of | 3.1 Identify types of evidence required to demonstrate competence |

| ELEMENT | PERFORMANCE CRITERIA |
|----------|--|
| evidence | in skills development 3.2 Discuss purpose of evidence with assessor 3.3 Collect examples of evidence for portfolio 3.4 Complete personal resume with assistance of assessor |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Learning | <ul style="list-style-type: none"> Applies knowledge and experience required to broaden future skills development |
| Reading | <ul style="list-style-type: none"> Identifies textual information to determine requirements |
| Writing | <ul style="list-style-type: none"> Uses information and industry-related terminology to complete required workplace documentation |
| Oral communication | <ul style="list-style-type: none"> Uses everyday language and listens to short, specific advice to identify career options and personal work goals |
| Initiative and Enterprise | <ul style="list-style-type: none"> Identifies specific qualifications, experience and/or skills needed for current or desired work role with assistance Seeks feedback on self-assessment results from a trusted source with encouragement |
| Teamwork | <ul style="list-style-type: none"> Asks questions with support to seek information or clarify instructions |
| Planning and organising | <ul style="list-style-type: none"> Plans and implements routine tasks directly related to own requirements |

Unit Mapping Information

Supersedes and is equivalent to BSBLED101 Plan skills development.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF101 Plan and prepare for work readiness

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- seek advice on work goals, assess own skills and prepare a portfolio of evidence of skills.

In the course of the above, the candidate must:

- seek advice from relevant stakeholders on:
 - work and career options
 - results of self-assessment
 - preparation of portfolio
- prepare a portfolio of evidence, including a resume.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- skill requirements for work goals and process of self-assessment
- examples of experiences that have contributed to skill development including personal work, life and study
- sources of advice on career planning and skill development
- types of evidence and methods to develop portfolios of evidence.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources for career development
- examples of resumes and career planning resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF201 Support personal wellbeing in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to advocate for and feel empowered about personal wellbeing in the workplace. It involves developing and applying basic knowledge of factors that may influence wellbeing, both positively and negatively.

The unit applies to those in a range of industry and workplace contexts, who work under direct supervision. It may also apply to learners who are preparing to enter the workforce.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Recognise factors that impact personal wellbeing | 1.1 Identify personal factors that may impact on wellbeing 1.2 Identify workplace factors that may impact on wellbeing 1.3 Recognise relationship between personal wellbeing and identified workplace factors relevant to own role |
| 2. Plan communication with supervisor | 2.1 Select appropriate communication approach 2.2 Identify appropriate method for communication about wellbeing 2.3 Plan relevant content for communication including strategy for dealing with a negative response |
| 3. Communicate with supervisor | 3.1 Arrange communication with supervisor 3.2 Conduct communication according to developed plan |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 3.3 Review effectiveness of communication |
| 4. Investigate available wellbeing resources | 4.1 Identify and review wellbeing resources 4.2 Select appropriate wellbeing resources applicable to own workplace 4.3 Document method for accessing selected resources |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information to determine job role and requirements |
| Oral communication | <ul style="list-style-type: none"> Participates in discussions using clear language and features appropriate to audience Uses listening and questioning techniques to request assistance and confirm understanding |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies own responsibilities and performs role requirements |
| Teamwork | <ul style="list-style-type: none"> Establishes relationship with relevant personnel |
| Planning and organising | <ul style="list-style-type: none"> Plans and organises tasks to achieve outcome within timeframes Uses analytical skills to decide on effective techniques to support own wellbeing |
| Problem Solving | <ul style="list-style-type: none"> Uses problem solving skills to address a range of issues, seeking advice of others, where necessary |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBWOR201 Manage personal stress in the workplace.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF201 Support personal wellbeing in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop a plan for communication with supervisor
- identify and access one formal and one informal wellbeing resource.

In the course of the above, the candidate must:

- develop a plan to communicate with supervisor, including:
 - factors that may impact on own wellbeing, both positively and negatively
 - appropriate style of communication
 - appropriate method of communication
 - strategy to deal with negative response.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- common personal and workplace factors that may impact on wellbeing
- advantages and disadvantages of different communication styles, including:
 - passive
 - assertive
 - aggressive
- methods for communicating with a supervisor
- key features of Employee Assistance Programs (EAPs)
- common workplace resources for addressing wellbeing.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- challenges and situations to demonstrate the application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF202 Plan and apply time management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to implement time management processes to organise and complete work tasks. It also addresses skills and knowledge to seek and review feedback for performance improvement regarding time management and use technology appropriate to the task.

The unit applies to individuals working under direct supervision. These individuals apply basic skills and knowledge in a broad range of work settings.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Organise work schedule | 1.1 Discuss and agree on work goals and plans with assistance from relevant personnel 1.2 Identify relationship between own work goals and plans, and organisational goals and plans 1.3 Research time management techniques and strategies 1.4 Plan and prioritise work tasks within allocated timeframes |
| 2. Complete work tasks | 2.1 Perform tasks according to designated timelines and instructions 2.2 Seek assistance from colleagues when difficulties arise in achieving allocated tasks |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------|--|
| | 2.3 Identify factors affecting work plan 2.4 Communicate progress on work plan to relevant personnel according to organisational policies and procedures |
| 3. Review work performance | 3.1 Seek feedback on time management from relevant personnel 3.2 Record changes to time management approach according to task instructions 3.3 Identify and plan opportunities for improvement in discussion with colleagues |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information to determine and adhere to organisational and task requirements |
| Writing | <ul style="list-style-type: none"> Completes required documents using organisational formats |
| Oral communication | <ul style="list-style-type: none"> Uses listening and questioning techniques to seek information and confirm understanding Participates in verbal interactions using language and features suitable to audience and context |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical information related to timeframes |
| Enterprise and initiative | <ul style="list-style-type: none"> Complies with organisational policies, procedures and standards |
| Planning and organising | <ul style="list-style-type: none"> Prioritises work and completes activities within designated timeframes Identifies and solves routine problems |
| Technology | <ul style="list-style-type: none"> Selects and uses appropriate digital tools to complete tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBWOR202 Organise and complete daily work activities.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF202 Plan and apply time management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement at least one time management plan with support of relevant personnel.

In the course of the above, the candidate must:

- complete each work task within specified timeframe, seeking opportunities to use digital tools where applicable
- seek and use feedback from others to monitor and improve work performance.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- time management techniques and strategies
- features of a time management plan
- organisational standards, policies and procedures relevant to own work role
- relationship between own work goals and plans and organisation's goals and plans
- factors affecting work progress and performance improvement techniques.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to challenges and situations to demonstrate application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF301 Organise personal work priorities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to organise personal work schedules, to monitor and obtain feedback on work performance and to maintain required levels of competence.

The unit applies to individuals who exercise discretion and judgement and apply a broad range of competencies in various work contexts.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Organise and complete own work schedule | 1.1 Develop work goals and key performance indicators (KPIs) according to task and organisational requirements 1.2 Prioritise workload according to task timeframes 1.3 Identify factors affecting achievement of work objectives 1.4 Develop personal work plans |
| 2. Evaluate own work performance | 2.1 Identify variations between expected and actual work performance according to task requirements and KPIs 2.2 Report variations to relevant personnel 2.3 Seek feedback from relevant personnel for solutions to minimise variations in expected and actual work outputs |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.4 Research sources of stress and access appropriate supports according to organisational policies and procedures |
| 3. Coordinate personal skill development and learning | 3.1 Identify personal and professional development needs for job role 3.2 Identify opportunities to undertake personal skill development activities in consultation with supervisor 3.3 Access professional development opportunities 3.4 Record professional development undertaken for continuous learning and career development process 3.5 Incorporate feedback into review of further learning needs |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Employs a range of approaches and investigative techniques to source the knowledge necessary to arrange personal learning experiences |
| Reading | <ul style="list-style-type: none"> Interprets textual information to determine organisation's procedures, own work performance and objectives |
| Writing | <ul style="list-style-type: none"> Prepares written reports and workplace documents that communicate information clearly and effectively |
| Oral communication | <ul style="list-style-type: none"> Provides and receives feedback using specific and relevant language Uses listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Complies with organisational policies, procedures and protocols |
| Teamwork | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role Proactively collaborates with others to achieve specific goals |
| Planning and organising | <ul style="list-style-type: none"> Plans and organises work commitments to ensure deadlines and objectives are met Uses formal analytical thinking techniques to recognise and respond to routine problems |
| Technology | <ul style="list-style-type: none"> Uses digital systems and tools to enter, store and monitor information |

Unit Mapping Information

Supersedes and is equivalent to BSBWOR301 Organise personal work priorities and development.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF301 Organise personal work priorities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare and implement a personal work plan.

In the course of the above, the candidate must:

- prepare a work plan according to organisational requirements and work objectives
- use technology to schedule, prioritise and monitor completion of tasks in a work plan
- assess and prioritise own work tasks and address contingencies
- monitor and assess personal performance against job role requirements by seeking feedback from relevant personnel
- identify personal development needs and access, complete and record skill development and learning.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies and procedures relevant to work tasks
- goals, objectives and key performance indicators for task within scope of job role
- methods to elicit, analyse and interpret feedback when communicating with other people in the workplace
- content of work plans including:
 - timeframes
 - tasks requirements
 - risks
 - contingencies for identified risks
- types of personal learning and professional development requirements
- principles and techniques of goal setting, measuring performance and time management

- signs and sources of stress and strategies to deal with stress in the workplace
- methods to identify and prioritise personal learning needs.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- challenges and situations to demonstrate application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF302 Develop self-awareness

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to improve self-reliance to confidently perform work tasks within the scope of own responsibility. It involves reflecting on personal development and acquiring knowledge of personal strengths and weaknesses through feedback from others. It also involves the development of goals and plans to improve workplace performance.

The unit applies to individuals who exercise discretion and judgement and apply a broad range of competencies in various work contexts. These individuals are required to develop and extend their self-reliance, self-esteem and confidence.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate attitudes and values | 1.1 Identify and assess differences between a personal attitude and value 1.2 Identify and document role of attitudes and values within the workplace 1.3 Evaluate and record relationship between attitudes and values |
| 2. Assess own skills | 2.1 Identify impacts of personal adaptability and flexibility for achieving organisational goals 2.2 Analyse role of personal motivation and self-awareness in |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | achieving own goals and organisational goals 2.3 Review and document role of commitment and resilience in the workplace |
| 3. Apply self-awareness in the workplace | 3.1 Review personal strengths and weaknesses and their implications for self-awareness 3.2 Create an action plan to develop self-awareness 3.3 Communicate action plan to relevant personnel and seek feedback 3.4 Revise and implement plan with guidance from relevant personnel |
| 4. Develop strategies for ongoing improvement | 4.1 Evaluate own ability to improve workplace performance 4.2 Develop strategies to meet opportunities for ongoing personal development 4.3 Monitor and revise action plan |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Applies existing thinking and current practices to examine self-awareness Researches activities and articles on relevant topics |
| Writing | <ul style="list-style-type: none"> Creates records on observations, experiences and thoughts Prepares documents to monitor and reflect on performance |
| Oral communication | <ul style="list-style-type: none"> Participates in a verbal exchange of observations and elicits the view and opinions of others by listening and questioning |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to test, strengthen and explore self-awareness and different ways of thinking |

Unit Mapping Information

Supersedes and is equivalent to BSBWRK311 Develop self-awareness.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF302 Develop self-awareness

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and improve self-awareness in at least three different work tasks.

In the course of the above, the candidate must:

- identify and document difference between an attitude and value
- identify the role of personal and other values in the workplace
- review influence of diverse values and attitudes on self-awareness and working environments
- develop and implement a self-awareness action plan
- interact and apply self-awareness with others as suitable for job role
- respond with self-awareness to changing situations.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- differences between attitudes and values
- factors contributing to effectiveness of own workplace performance
- features of personal motivations and implications for workplace development
- strategies and documentation for a self-awareness action plan.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to challenges and situations to demonstrate application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF401 Manage personal health and wellbeing

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify signs and sources of strain on personal health and wellbeing (both physical and mental) within job roles and according to key performance indicators (KPIs).

The unit applies to individuals who operate with a high level of autonomy, have excellent communication skills and apply knowledge of organisational policies and relevant legislation.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review health and wellbeing framework | 1.1 Identify factors in the work environment that may impact on own physical and mental health 1.2 Research techniques for management of own physical health and mental wellbeing 1.3 Assess available resources for inclusion as part of personal health and wellbeing strategy 1.4 Review legislative and organisational policies and procedures relating to health and wellbeing |
| 2. Develop and implement personal health and wellbeing | 2.1 Develop strategy for managing personal health and wellbeing 2.2 Share personal health and wellbeing strategy with relevant personnel |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| strategy | 2.3 Schedule activities that align with personal health and wellbeing strategy |
| 3. Review personal health and wellbeing strategy | 3.1 Monitor own performance against key performance indicators 3.2 Identify new circumstances impacting work requirements and impact on personal health and wellbeing strategy 3.3 Review and update personal health and wellbeing strategy to reflect new circumstances |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Analyses and compares specific and complex text to determine and distinguish requirements |
| Writing | <ul style="list-style-type: none"> Develops documents that clearly explain ideas and advice Records information using required tools |
| Numeracy | <ul style="list-style-type: none"> Interprets mathematical information related to timelines |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies legislative responsibility to provide a safe working environment |
| Planning and organising | <ul style="list-style-type: none"> Plans and monitors tasks to ensure deadlines are met and competing demands are accommodated Establishes, implements and monitors strategies, development plans and actions Uses problem-solving techniques to analyse and address issues that arise |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBWOR403 Manage stress in the workplace.

Links

Companion Volume Implementation Guide is found on VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF401 Manage personal health and wellbeing

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, implement and review one personal health and wellbeing strategy.

In the course of the above, the candidate must:

- evaluate factors that may impact personal health and wellbeing in own personal life and work environment
- locate and assess applicable resources
- present personal health and wellbeing strategy to relevant personnel
- monitor variations in personal circumstances and work performance affecting health and wellbeing.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- techniques for management of physical health
- techniques for management of mental wellbeing
- time management tools and techniques
- key features of organisational policies and procedures relating to health and wellbeing
- requirements under work health and safety (WHS) legislation to address workplace stress.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to challenges and situations to demonstrate the application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF402 Develop personal work priorities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan and prioritise own work tasks. It also addresses the skills and knowledge to monitor and obtain feedback on personal work performance.

The unit applies to individuals who are required to design their own work schedules and work plans and to establish priorities for their work. They will typically hold some responsibilities for the work of others and have some autonomy in relation to their own role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan personal work schedule | 1.1 Identify task requirements 1.2 Identify own accountabilities in line with task requirements 1.3 Assess barriers for performance of personal accountabilities 1.4 Develop a personal work schedule |
| 2. Implement personal work schedule | 2.1 Communicate personal work schedule to relevant personnel 2.2 Monitor own performance according to personal work schedule 2.3 Document variations between expected and actual work performance according to task requirements and communicate to relevant personnel |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|--|
| 3. Review personal work priorities | 3.1 Seek and evaluate feedback from relevant stakeholders on own work performance 3.2 Analyse variations between expected and actual work performance 3.3 Update personal work schedule according to internal and external feedback and changes in circumstances |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Learning | <ul style="list-style-type: none"> Develops strategies to reflect on own performance and obtain feedback |
| Reading | <ul style="list-style-type: none"> Identifies and applies textual information from relevant sources to understand organisation's policies and practices |
| Writing | <ul style="list-style-type: none"> Prepares written reports and workplace documentation that communicate complex information clearly and effectively |
| Numeracy | <ul style="list-style-type: none"> Analyses numerical information related work accountabilities |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies and understands roles and responsibilities in relation to organisational objectives, policies and procedures |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises and implements tasks to meet organisational requirements Uses the main features and functions of digital technologies and tools to complete work tasks efficiently and effectively |

Unit Mapping Information

Supersedes and is equivalent to BSBWOR404 Develop work priorities.

Supersedes but is not equivalent to:

- BSBSMB408 Manage personal, family, cultural and business obligations
- BSBWOR424 Develop a time management plan.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF402 Develop personal work priorities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, implement and review one personal work schedule.

In the course of the above, the candidate must:

- identify personal responsibilities and barriers to their fulfilment according to task requirements
- prepare a personal work schedule
- communicate work schedule to relevant personnel
- monitor personal work performance to identify variations between expected and actual work performance
- review own work performance against workgroup objectives through self-assessment and seeking and acting on feedback from internal and external stakeholders.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- content of work plans including:
 - resource requirements
 - stakeholder needs
 - workgroup targets
- business technology applications to schedule tasks and plan work
- methods of personal work performance review including:
 - self-assessment
 - feedback from others
- techniques to prepare personal plans and establish priorities
- methods to elicit, analyse and interpret feedback.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to challenges and situations to demonstrate the application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF403 Lead personal development

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to take responsibility for conscious decision -making processes to contribute to own personal development in the workplace.

The unit applies to individuals who require enhanced personal and social awareness skills within the workplace and personal situations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate personal development needs | 1.1 Identify impact of personal motivations, attitudes and values on workplace relationships 1.2 Analyse and record instances of personal interpersonal biases impacting workplace relationships 1.3 Create a self-regulation management plan according to organisational policy 1.4 Seek feedback on plan from relevant personnel and adjust as appropriate |
| 2. Implement personal development techniques | 2.1 Monitor impact on personal performance and on others according to self-regulation management plan 2.2 Identify tasks and opportunities to contribute to the development of emotional intelligence in others |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.3 Develop strategies for reviewing strengths and limitations of personal development |
| 3. Review and refine personal development | 3.1 Identify key areas to sustain health, growth and wellbeing and coping safely and efficiently in working environment 3.2 Assess and document own interpersonal skills 3.3 Review interpersonal styles and their impacts in the workplace 3.4 Review and update self-regulation management plan |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Writing | <ul style="list-style-type: none"> Develops texts dealing with complex ideas and concepts using specialised and detailed language to convey explicit information regarding personal development |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies the implications of behaviour, language and other organisational responsibilities in carrying out own role |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for developing and implementing plans and processes to achieve organisational objectives, seeking feedback and advice, as required |

Unit Mapping Information

Supersedes and is equivalent to BSBWRK412 Contribute to personal development.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF403 Lead personal development

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and adapt one self-regulation plan to enhance workplace performance using understanding of emotional intelligence.

In the course of the above, the candidate must:

- research and plan opportunities for own personal development
- identify and record areas for further development in own behaviour in relation to others
- interact and apply self-awareness with others as suitable to and within job role
- monitoring progress of own interpersonal skills.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- differences between positive and negative workplace behaviour
- types of interpersonal skills including managing emotions and reactions to ongoing work experiences
- interpersonal skill concepts
- factors affecting the development of attitudes and values
- features of personal motivations and implications for workplace development
- key feature of emotional intelligence in leading personal development.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to challenges and situations to demonstrate the application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF501 Manage personal and professional development

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to implement systems and process that support the personal and professional development of self and others.

The unit applies to individuals working in a range of managerial positions who are accountable for the development and performance of others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Manage work goal development | 1.1 Document team member responsibilities and identify organisational framework for development of work goals 1.2 Support others to develop work goals, plans and activities that align with their responsibilities 1.3 Assess others' work goals, plans and activities for alignment with organisational goals and provide feedback to team members 1.4 Facilitate access to personal and professional development opportunities that align to team member goals, plans and activities |
| 2. Facilitate achievement of work priorities | 2.1 Assess and prioritise personal, team and organisational demands 2.2 Use technology to manage work priorities of the team |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.3 Identify and implement techniques to manage team health and wellbeing in the workplace |
| 3. Develop and maintain professional competence | 3.1 Document own development needs, priorities and plans using applicable competency standards, where required 3.2 Seek feedback from relevant personnel on own development needs 3.3 Participate in personal and professional development activities that address identified needs, priorities and plans |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Learning | <ul style="list-style-type: none"> Investigates and uses a range of strategies to develop personal competence |
| Reading | <ul style="list-style-type: none"> Analyses and interprets textual information from organisational policies and practices or feedback to inform personal development planning |
| Writing | <ul style="list-style-type: none"> Uses feedback to prepare reports that summarise ways to improve competence |
| Oral communication | <ul style="list-style-type: none"> Uses active listening and questioning to seek and receive feedback |
| Enterprise and Initiative | <ul style="list-style-type: none"> Identifies how own role contributes to broader organisational goals Considers organisational protocols when planning career development of self and others |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders Uses interpersonal skills to establish and build positive working relationships with others |
| Planning and organising | <ul style="list-style-type: none"> Plans and prioritises tasks in order to meet deadlines, manage role responsibilities and to manage own personal welfare Identifies and uses appropriate technology to improve work efficiency |
| Technology | <ul style="list-style-type: none"> Uses technology to manage and prioritise work tasks |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBLED503 Maintain and enhance professional practice
- BSBWOR501 Manage personal work priorities and professional development.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF501 Manage personal and professional development

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement a plan for own personal and professional development
- manage personal and professional development of at least two other individuals.

In the course of the above, the candidate must:

- identify roles and responsibilities of team members
- support two different individuals to develop work goals that align with their role and responsibilities
- facilitate team member access to relevant personal and professional development activities
- use technology to organise and prioritise tasks and commitments of a team or work area
- research and implement techniques for maintaining health and wellbeing of self and others
- develop personal work goals, plans and activities to meet work goals
- measure personal work performance, including assessing competency against competency standards
- participate in personal and professional development activities to develop professional competence.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- roles and responsibilities of team members
- principles and techniques involved in the management or organisation of:
 - performance measurement
 - personal behaviour, self-awareness and personality traits identification
 - personal development plans
 - personal goal setting

- task prioritisation
- common personal and professional development activities relevant to the industry
- technology to plan and prioritise work tasks
- techniques to manage health and wellbeing in the workplace
- organisation's human resources policies and procedures relevant to professional development.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to challenges and situations to demonstrate the application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPEF502 Develop and use emotional intelligence

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and use emotional intelligence to increase self-awareness, self-management, social awareness and relationship management in the workplace.

The unit applies to individuals who are required to identify, analyse, synthesise and act on information from a range of sources and who deal with unpredictable problems as part of their job role. These individuals may be responsible for leading a team or work area.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking & Problem Solving – Personal Effectiveness

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to develop emotional intelligence | 1.1 Develop evaluation criteria for assessing emotional strengths and weaknesses 1.2 Assess emotional strengths and weaknesses against evaluation criteria 1.3 Identify and analyse potential emotional stressors in the workplace 1.4 Identify methods for responding to emotional stressors 1.5 Seek feedback from others to identify and confirm methods for responding to emotional stressors in the workplace |
| 2. Develop emotional | 2.1 Analyse and document emotional responses of co-workers |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| intelligence | 2.2 Develop a plan for identifying and responding to a range of emotional expressions 2.3 Apply techniques that indicate flexibility and adaptability in dealing with others in the workplace 2.4 Apply techniques that show consideration for the emotions of others when making decisions 2.5 Consult with relevant stakeholders and identify improvement areas for own emotional intelligence |
| 3. Promote development of emotional intelligence in others | 3.1 Identify workplace opportunities for others to express their thoughts and feelings 3.2 Develop tasks for assisting others to understand effect of personal behaviour and emotions on others in the workplace 3.3 Implement identified opportunities and tasks in the workplace according to organisational policy and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Learning | <ul style="list-style-type: none"> Identifies and uses strategies to improve own emotional intelligence |
| Oral communication | <ul style="list-style-type: none"> Uses appropriate language and nonverbal features to present information and seek feedback Uses listening and questioning skills to elicit the views of others and to clarify or confirm understanding |
| Teamwork | <ul style="list-style-type: none"> Identifies personal attributes and considers the impact on others and modifies approach to support development Adapts personal communication style to model behaviours, build trust and positive working relationships and to build understanding of emotional intelligence Leads a collaborative approach, using inquiring and inclusive techniques, to develop understanding and skills that enhances individuals' emotional intelligence |
| Enterprise and Initiative | <ul style="list-style-type: none"> Leads processes to develop, implement and monitor plans and processes to ensure team engagement and effectiveness |

Unit Mapping Information

Supersedes and is equivalent to BSBLDR511 Develop and use emotional intelligence.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPEF502 Develop and use emotional intelligence

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- demonstrate emotional intelligence in relation to at least two different work tasks
- promote development of emotion intelligence in others on at least one occasion.

In the course of the above, the candidate must:

- develop assessment criteria to assess personal emotional strengths and weaknesses
- conduct an analysis to identify personal emotional triggers, incorporating feedback from others
- analyse and document interactions with co-workers
- develop and implement plans for responding to emotional expressions
- apply techniques that promote flexibility in interactions with others and show consideration for the emotions of others.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- application of emotional intelligence attributes, including:
 - self-awareness
 - self-management
 - social awareness
 - relationship management
- emotional intelligence principles and strategies
- strategies for communicating with a diverse workforce that has varying expressions of emotion
- methods to develop emotional intelligence in others
- emotional intelligence in the context of building workplace relationships.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to challenges and situations to demonstrate the application of performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG420 Apply project scope management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to contribute to the project's scope by assisting with identifying its objectives, deliverables, constraints, assumptions and outcomes. It also involves applying controls once the project has commenced and contribute to reviewing the suitability of those controls.

The unit applies to individuals who support project managers and other team members to apply project scope management techniques.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to defining project scope | 1.1 Participate in identifying project objectives and requirements and review project initiation documentation 1.2 Contribute to identifying project deliverables 1.3 Contribute to identifying measurable outcomes to enable evaluation of project performance 1.4 Contribute to developing and documenting the scope management plan 1.5 Confirm approval of project scope with relevant project authority |
| 2. Apply project scope | 2.1 Undertake work according to agreed project scope management |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| controls | plan 2.2 Identify and respond to variations according to established change control procedures within scope of own responsibility 2.3 Communicate instances of non-compliance with overall scope to the project manager and other team members |
| 3. Contribute to review of scope controls | 3.1 Identify scope changes against scope management plan with assistance 3.2 Contribute to reporting scope changes 3.3 Participate in reviewing effectiveness of project outcomes |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and analyses complex texts |
| Writing | <ul style="list-style-type: none"> Contribute to developing and amending plans and associated documentation using appropriate organisational formats and vocabulary |
| Oral Communication | <ul style="list-style-type: none"> Interacts effectively in verbal exchanges, using clear language to convey information, and active listening and questioning to clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Selects and applies a range of mathematical and problem-solving strategies to contribute to developing timelines and monitoring progress |
| Teamwork | <ul style="list-style-type: none"> Uses appropriate communication practices in a range of work contexts Collaborates and cooperates with others to achieve shared goals |
| Planning and organising | <ul style="list-style-type: none"> Contributes to plans and organises tasks required to monitor and report on project implementation Analyses outcomes to identify future improvements |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG409 Apply project scope management techniques.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG420 Apply project scope management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support project managers and other team members to apply project scope management techniques during at least two different projects.

In the course of the above, the candidate must:

- work according to project scope management plan including established change control procedures and performance measurement procedures
- contribute to delineating and controlling project scope
- communicate with the project manager and other team members
- record project scope management plan
- interpret and follow project initiation documentation for purposes of documenting project scope.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- components of project scope management plans including:
 - established change control procedures
 - performance measurement indicators
- factors likely to impact project scope
- procedures relating to scope change including:
 - formal change-control processes
 - reporting change
- methods for measuring work outcomes and progress against plans
- methods for reviewing project outcomes
- scope control methods

- types of project initiation documentation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

- project documentation which includes information about project scope.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG421 Apply project time management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist with project scheduling activities, apply and monitor the agreed project schedule, and evaluate the effectiveness of time management for the project.

The unit applies to individuals who are project practitioners working in a project support role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assist in developing project schedule | 1.1 Contribute to developing work breakdown structure 1.2 Contribute to estimating duration and effort, sequence and dependencies of tasks to achieve project deliverables 1.3 Contribute to identifying schedule impact on project time management, resource requirements, costs and risks using project scheduling tools and techniques 1.4 Contribute to achieving an agreed schedule baseline and communicating the schedule to stakeholders |
| 2. Maintain project schedule | 2.1 Record and report progress of activities in relation to agreed schedule using selected tool 2.2 Record baseline variance between actual and planned progress 2.3 Contribute to forecasting impact of change on the schedule and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | analysing options 2.4 Update task status and agreed changes to maintain currency and accuracy of schedule |
| 3. Participate in assessing time-management outcomes | 3.1 Participate in determining effectiveness of time management from review of project performance 3.2 Contribute to document scheduling and time-management issues and responses to assist in project evaluation |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets project documentation to determine scheduling requirements and review performance |
| Writing | <ul style="list-style-type: none"> Documents project activities using structure, layout, vocabulary, and conventions appropriate to context |
| Oral Communication | <ul style="list-style-type: none"> Interacts effectively in verbal exchanges, using clear language and appropriate features to convey information Uses active listening and questioning to elicit and assess relevant information |
| Numeracy | <ul style="list-style-type: none"> Selects and applies a range of mathematical strategies to contribute to determining resources and measuring work output against a predetermined timeline |
| Planning and organising | <ul style="list-style-type: none"> Contributes to plans and implements tasks required to monitor implementation of plans Contributes to reviews and reflections on outcomes to identify whether objectives were met Uses digital tools to enter, analyse and present data and information |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG410 Apply project time management techniques.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG421 Apply project time management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support project managers and other team members to apply project time management techniques during at least two different projects.

In the course of the above, the candidate must:

- create a project schedule showing tasks, deliverable milestones, sequence, dependencies and time estimates
- apply time-management techniques in a project
- use relevant tools and techniques to maintain, monitor and update a project schedule.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- contents of work breakdown structure detail to enable effective project planning and control
- implications of time management for project resources, costs and risks
- methods for estimating task duration and resource requirements
- tools and techniques for managing project time and their particular applications
- methods to evaluate the effectiveness of time management
- techniques used to measure, record and report progress of activities.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation relevant to project management

- planning tools.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG422 Apply project quality management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to enhance project outcomes by contributing to quality planning, applying quality policies and procedures, and contributing to continuous improvement in projects.

The unit applies to individuals who are project practitioners working in a project support role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to project quality planning | 1.1 Contribute to determining quality requirements of project stakeholders 1.2 Contribute to identifying quantifiable quality criteria for project deliverables 1.3 Locate and interpret policy and procedures for project quality 1.4 Contribute to developing quality requirements in the project plan and processes |
| 2. Apply quality policies and procedures | 2.1 Implement quality assurance in the project according to agreed quality standards and guidelines 2.2 Select and apply quality management tools and techniques to project processes according to organisational policy 2.3 Maintain quality-control records and audit documentation |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>according to agreed procedures</p> <p>2.4 Identify and maintain records against agreed quality requirements</p> <p>2.5 Communicate shortfalls in quality outcomes to others to enable appropriate action to be initiated</p> |
| 3. Contribute to project continuous improvement process | <p>3.1 Participate in a continuous improvement processes including and review project outcomes</p> <p>3.2 Report quality management issues and responses to others for application to future projects</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Reviews and evaluates project documentation and stakeholder feedback |
| Writing | <ul style="list-style-type: none"> Prepares and updates documentation, using appropriate language, and matching style of writing to purpose and audience Creates and updates records according to organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Uses clear language to share and review information with others |
| Numeracy | <ul style="list-style-type: none"> Extracts and evaluates mathematical information embedded in a range of tasks and texts |
| Self-management | <ul style="list-style-type: none"> Adheres to policies, procedures and legislative requirements |
| Teamwork | <ul style="list-style-type: none"> Selects appropriate communication practices in a range of work contexts Collaborates and cooperates with others to achieve shared goals |
| Planning and organising | <ul style="list-style-type: none"> Plans and organises tasks and activities to apply organisational quality compliance requirements Uses formal and informal processes to monitor implementation of plans and reflect on outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG411 Apply project quality management techniques.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG422 Apply project quality management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support project managers and other team members to apply project quality management techniques during at least two different projects.

In the course of the above, the candidate must:

- work in a team environment to plan and develop quality management and continuous improvement parameters
- apply quality management techniques in a project relevant to the organisation and industry context
- maintain accurate quality records
- contribute to project continuous improvement process.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policy and procedures for project quality
- continuous improvement processes
- quality-assurance processes and requirements
- quality-control processes and requirements
- quality criteria relevant to industry
- quality management tools and methodologies relevant to industry and organisation
- quality standards and their place in the project life cycle.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- project documentation used for quality management purposes
- project records.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG423 Apply project cost management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist in producing a project budget, to monitor project expenditure and contribute to cost finalisation processes.

The unit applies to individuals who are project practitioners working in a project support role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assist in developing project budget | 1.1 Identify project objectives, duration, deliverables and resource requirements 1.2 Apply cost-estimating methods and calculate costs of project resource requirements 1.3 Identify estimated costs for tasks and activities 1.4 Communicate cost estimates to relevant staff and confirm accuracy and obtain input for project budget and cash flow management 1.5 Contribute to finalisation of project budget and costs 1.6 Contribute to developing cost management strategies and processes |
| 2. Monitor project costs | 2.1 Monitor income and expenditure against project budget and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>established cost estimates at predetermined intervals</p> <p>2.2 Identify and report variations in budget using established project cost methods, techniques and tools</p> <p>2.3 Assist in managing budget and costs using established cost management strategies and processes</p> <p>2.4 Confirm cost objectives remain achievable throughout project life cycle</p> <p>2.5 Update cost estimates and budget according to income and expenditure</p> |
| 3. Contribute to cost-finalisation process | <p>3.1 Assist relevant personnel to review final project outcomes, budget and costs</p> <p>3.2 Seek feedback and identify cost-management improvements</p> <p>3.3 Document cost-management improvements based on feedback received</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Prepares reports and reviews matching writing style to purpose and audience |
| Oral Communication | <ul style="list-style-type: none"> Uses clear language and appropriate features to convey and discuss cost-management issues |
| Numeracy | <ul style="list-style-type: none"> Extracts and evaluates mathematical information embedded in a range of tasks and texts Uses a range of informal and formal oral and written mathematical language and symbols to communicate mathematically |
| Self-management | <ul style="list-style-type: none"> Identifies and follows protocols |
| Teamwork | <ul style="list-style-type: none"> Collaborates and cooperates with others to achieve shared goals |
| Planning and organising | <ul style="list-style-type: none"> Reflects on outcomes to identify future improvement opportunities |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG412 Apply project cost management techniques.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG423 Apply project cost management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support project managers and other team members to apply project cost management techniques during at least two different projects.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- budgeting processes
- cost estimation methods, techniques and tools
- project life cycle
- cost management strategies and processes
- financial assets, liabilities and records
- cost management tools and techniques.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- project management budgets and related documentation
- organisational policies and procedures relating to financial assets, liabilities and records.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG424 Apply project human resources management approaches

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist with aspects of human resources management of a project. It involves establishing human resource requirements, identifying and facilitating the learning and development needs of people working on the project and resolving conflict in the team.

The unit applies to individuals who are project practitioners working in a project support role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish human resource requirements | 1.1 Identify human resource and project task requirements 1.2 Create work breakdown structure including human resources according to task requirements 1.3 Prepare a skills analysis of project stakeholders against project task requirements 1.4 Assist in identifying and discussing learning and development needs, goals, desired outcomes and relationships with relevant staff 1.5 Assist in assigning responsibilities to staff members for achieving project deliverables according to goals and desired |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|--|
| | outcomes |
| 2. Maintain team relationships | 2.1 Facilitate a team environment for staff members learning and development needs to be met 2.2 Confirm that key stakeholders in teams are establishing relationships and achieving desired outcomes 2.3 Identify challenges and conflict within teams 2.4 Assist in communicating with individuals and teams to resolve conflict where required 2.5 Communicate with staff members and identify barriers to achieving desired outcomes |
| 3. Monitor human resources | 3.1 Monitor task completion by relevant stakeholders against assigned roles and responsibilities 3.2 Assist in reviewing skill levels against allocated tasks and recommend solutions according to organisational requirements 3.3 Communicate with relevant stakeholders when assigned responsibilities are not met 3.4 Assist in offering human resource development opportunities to individuals with skill gaps |
| 4. Evaluate human resource practices | 4.1 Assist in reviewing the effectiveness of project human resources management 4.2 Seek and discuss feedback from relevant stakeholders 4.3 Make changes to human resource practices based on feedback received |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Seeks feedback from others as a strategy to improve own skills or knowledge |
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from organisational documentation |
| Writing | <ul style="list-style-type: none"> Develops a range of documents using structure and vocabulary appropriate to audience, context and purpose |
| Oral Communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using clear language and appropriate non-verbal features to provide and seek information Uses active listening and questioning techniques to elicit views and |

| | |
|---------------------------|--|
| | opinions of others |
| Self-management | <ul style="list-style-type: none">Understands responsibilities associated with own role |
| Teamwork | <ul style="list-style-type: none">Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interactionUses a range of strategies to facilitate solutions to conflicts |
| Planning and organising | <ul style="list-style-type: none">Plans and implements required tasks, monitors actions against requirements, and adjusts plans and resources to cope with contingenciesReflects on outcomes to identify opportunities for future improvement |
| Problem solving | <ul style="list-style-type: none">Uses a range of strategies to facilitate solutions to conflicts |
| Initiative and enterprise | <ul style="list-style-type: none">Uses active listening and questioning techniques to elicit views and opinions of others |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG413 Apply project human resources management approaches.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG424 Apply project human resources management approaches

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- support project managers and other team members to apply project human resources management techniques during at least two different projects.

In the course of the above, the candidate must:

- construct effective methods for monitoring roles, responsibilities and performance in projects
- demonstrate methods for providing feedback on performance and improving performance of project team members
- communicate information and ideas to others in a logical, concise and understandable manner
- undertake work in a multi-disciplinary environment according to established human resource management practices, plans, guidelines and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- project personnel engagement options
- job design principles and work breakdown structures
- learning and development approaches that can be incorporated into project life cycle
- methods for skills analysis
- project roles, responsibilities and reporting requirements for human resources
- styles and methods of communication according to organisational standards, group expectations and desired outcomes
- conflict resolution strategies
- stakeholder engagement styles.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG425 Apply project information management and communications techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to provide a critical link between people, ideas and information at all stages in the project life cycle. It involves assisting the project team to plan communications, communicating information related to the project, and reviewing communications.

The unit applies to individuals who are project practitioners working in a project support role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to communication procedures planning | 1.1 Identify project needs and organisational objectives 1.2 Contribute to developing project communications plan networks and techniques 1.3 Agree on and document communication procedures 1.4 Seek feedback on communication plan, networks and techniques from clients and other relevant stakeholders 1.5 Modify communication plan according to feedback |
| 2. Conduct information-management | 2.1 Identify, gather and analyse project information 2.2 Communicate procedures for storing stakeholder information to |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| ent activities | relevant stakeholders according to organisational policies and procedures 2.3 Store information and confirm data is secure and auditable |
| 3. Communicate project information | 3.1 Communicate with clients and other stakeholders according to agreed communication plan, networks and techniques and confirm flow of necessary information 3.2 Seek feedback from relevant project authorities on information management 3.3 Confirm reports are prepared and released according to organisational policies and procedures |
| 4. Contribute to assessing effectiveness of communication | 4.1 Assist in ongoing review of project outcomes and determine effectiveness of communications-management activities 4.2 Seek feedback and advice from relevant stakeholders on communications-management activities 4.3 Document communications-management issues and responses 4.4 Communicate issues and responses to higher project authorities |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies textual information from a range of sources and determines how content may be applied |
| Writing | <ul style="list-style-type: none"> Contributes to the development of plans and reports using structure and vocabulary appropriate to audience, context and purpose Maintains records according to organisational requirements |
| Planning and organising | <ul style="list-style-type: none"> Maintains records according to organisational requirements Manages information storage, retrieval and sharing, according to security requirements |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language and appropriate non-verbal features to provide and seek information Uses active listening and questioning techniques to elicit views and opinions of others |
| Self-management | <ul style="list-style-type: none"> Identifies importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how |
| Teamwork | <ul style="list-style-type: none"> Collaborates and cooperates with others to achieve shared goals |

| SKILL | DESCRIPTION |
|-----------------|--|
| Problem-solving | <ul style="list-style-type: none">Sequences and schedules required tasks, monitors implementation and manages relevant communicationReviews outcomes to identify opportunities for future improvementsManages information storage, retrieval and sharing, according to security requirements |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG414 Apply project information management and communications techniques.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG425 Apply project information management and communications techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to project information management and communications techniques during at least two different projects.

In the course of the above, the candidate must:

- plan and implement necessary communications for a workplace project
- evaluate and review the above project communication outcomes and make recommendations for future improvements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- models and methods of communications management in context of project life cycle and other project management functions
- information security
- methods of reviewing outcomes
- organisational policies and procedures to fulfil performance criteria.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of project management documentation for communications-management purposes
- documentation about project team involvement in communications activities
- relevant organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG426 Apply project risk management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist with aspects of risk management in a project. It specifically involves planning for, controlling and reviewing risks associated with the project, and assisting in this process where required.

The unit applies to individuals who are project practitioners working in a project support role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assist with risk analysis and planning | 1.1 Identify project deliverables, objectives and resources 1.2 Identify and prioritise potential and actual risks of project, and advise project manager 1.3 Establish with relevant personnel risk-analysis methods, techniques and tools 1.4 Contribute to developing risk management strategies, approaches and plans according to organisational policies and procedures 1.5 Contribute to developing and implementing risk-reporting mechanisms |
| 2. Review risks and execute risk-control | 2.1 Monitor actual and potential risks according to agreed project and risk management plans and advise project manager of |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| activities | changing circumstances 2.2 Identify opportunities and changing environment for project activities, and advise project manager 2.3 Contribute to amending project and risk management plans and confirming plans reflect the changing environment 2.4 Contribute to reporting opportunities for risk control |
| 3. Develop contingency plan | 3.1 Contribute to corrective action on risks according to risk management plan and delegated authority 3.2 Contribute to review of contingency plans on an ongoing basis 3.3 Confirm tasks allocated to individuals and teams are agreed with supervisor before implementation 3.4 Apply and monitor risk-contingency measures |
| 4. Contribute to assessing risk management outcomes | 4.1 Contribute to ongoing review of project outcomes and determine effectiveness of risk management activities 4.2 Seek feedback and identify risk management issues 4.3 Report risk management issues and responses to relevant stakeholders 4.4 Make changes to project management techniques based on feedback received |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Documents results of analyses using required organisational formats Contribute to project documentations using structure and vocabulary appropriate to audience, context and purpose |
| Oral communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using clear language and non-verbal features to provide relevant information Uses active listening and questioning techniques to elicit views and opinions of others |
| Self-management | <ul style="list-style-type: none"> Identifies responsibilities of own role in terms of its contribution to broader goals of work environment |
| Teamwork | <ul style="list-style-type: none"> Selects appropriate communication protocols in a range of work contexts |

| SKILL | DESCRIPTION |
|-------------------------|---|
| | <ul style="list-style-type: none">• Collaborates and cooperates with others to achieve shared goals |
| Planning and organising | <ul style="list-style-type: none">• Sequences and schedules required tasks and activities and manages relevant communication• Identifies outcomes to identify opportunities for future improvement |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG415 Apply project risk management techniques.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG426 Apply project risk management techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply project risk management techniques during at least two different projects.

In the course of the above, the candidate must:

- assist project manager in identifying and prioritising potential risks and developing risk-management strategies, plans and reporting mechanisms
- apply, monitor and review risk-control measures, including contingency measures to mitigate risks
- evaluate, review and report on risk-management processes and make recommendations for future improvements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- risk-analysis methods, techniques and tools, including:
 - risk management strategies, plans and approaches
 - risk-reporting mechanisms for projects
 - collection methods for project risk records and other information according to organisational policies and procedures
 - risk-contingency measures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- project management documentation for risk management
- workplace risk management policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG427 Apply project procurement procedures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist with procurement for a project. It involves identifying procurement requirements, assisting with supplier selection, conducting procurement activities, and assisting with procurement finalisation activities for the project.

The unit applies to individuals who are project practitioners working in a project support role.

The project assistant may be part of a project team under the direction of a project manager, or may work as part of a smaller scale, self-directed team.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assist with procurement planning | 1.1 Contribute to establishing procurement requirements according to project objectives 1.2 Contribute to developing procurement-management plan and documentation |
| 2. Contribute to supplier selection process | 2.1 Gather and evaluate information on potential suppliers 2.2 Make recommendations and assist in selection of preferred suppliers 2.3 Contribute to establishing agreed terms and conditions with |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | <p>preferred suppliers</p> <p>2.4 Assist relevant personnel in establishing and checking relevant stakeholders perform agreed terms</p> <p>2.5 Assist in developing contractual documentation</p> |
| 3. Conduct procurement activities | <p>3.1 Test and accept supplies and confirm fit for purpose in both quality and suitability</p> <p>3.2 Undertake procurement activities and maintain information according to reporting, confidentiality and audit requirements</p> <p>3.3 Receive, reconcile and register supplies according to established procedures</p> <p>3.4 Monitor and control suppliers and contractual supply documentation</p> |
| 4. Assist in finalising procurement activities | <p>4.1 Assist in finalising procurement activities</p> <p>4.2 Assist in review of project outcomes using available records to determine effectiveness of procurement activities</p> <p>4.3 Contribute to making changes to project procurement procedures based on feedback received</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from a variety of texts |
| Writing | <ul style="list-style-type: none"> Contributes to developing project documents using vocabulary and structure appropriate to audience, context and purpose Completes project documentation using required formats and structure |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language and appropriate non-verbal features to provide and seek information Uses questioning and listening skills to check and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Uses basic mathematical formula to calculate whole numbers and decimals to confirm financial accounts match purchased items |
| Initiative and enterprise | <ul style="list-style-type: none"> Understands responsibilities and boundaries associated with own role Adheres to organisational policies and procedures when planning and undertaking work |
| Teamwork | <ul style="list-style-type: none"> Uses accepted communication practices and protocols to share or |

| SKILL | DESCRIPTION |
|-------------------------|--|
| | <p>provide information</p> <ul style="list-style-type: none">• Collaborates with others to achieve project outcomes |
| Planning and organising | <ul style="list-style-type: none">• Plans, organises and implements tasks required to achieve outcomes according to organisational requirements• Reflects on outcomes to gain insights into future improvements |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG416 Apply project procurement procedures.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG427 Apply project procurement procedures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- assist application of project procurement processes during at least two different projects.

In the course of the above, the candidate must:

- document procurement requirements for a workplace project, including clear descriptions of product and service, quality specifications, resource identification, supply and delivery requirements and supply and engagement metrics
- apply procurement-management procedures to a workplace project, including selection criteria, testing and accepting, monitoring and receiving supplies
- finalise procurement agreements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- procurement-management policy, processes and procedures
- procurement documentation requirements
- components of contractual documentation and the legal obligations of all parties
- process used to select preferred contractors
- project procurement-management tools and techniques.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of project procurement documentation
- examples of procurement tasks and activities

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG428 Apply project life cycle management processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist in implementing project life cycle management processes.

The unit applies to individuals who are project practitioners working in a project support role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assist in establishing project | 1.1 Identify project scope 1.2 Identify relevant project stakeholders and team members 1.3 Identify project initiation documentation 1.4 Assist in negotiating and documenting project objectives, outcomes and benefits 1.5 Identify relationship between the project and broader organisational strategies and goals 1.6 Assist in establishing the project governance structure |
| 2. Support project planning and design processes | 2.1 Assist in drafting a project charter for approval 2.2 Assist in developing a project budget 2.3 Support relevant personnel in breaking down project objectives into deliverables |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 2.4 Identify project milestones and map clearly against time and objectives 2.5 Assist in compiling relevant plans and project baselines for project management plan |
| 3. Assist with project control and execution | 3.1 Prepare, maintain and update status reports on project progress and identified challenges 3.2 Seek feedback and changes required to the project from relevant stakeholders 3.3 Assist with undertaking an impact analysis of proposed changes to the project 3.4 Update associated plans and reflect project progress against baselines and approved changes |
| 4. Assist with project finalisation | 4.1 Prepare finalised project products and associated documentation for handover to client 4.2 Assist in completing financial, legal and contractual obligations 4.3 Provide feedback and suggestions for improvement to project performance 4.4 Review project performance, assessments and document lessons learned |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Recognises and interprets textual information from a range of sources and determines how content may be applied to organisational requirements |
| Writing | <ul style="list-style-type: none"> Uses clear, industry specific terminology, and appropriate structure, to complete and update, workplace documentation Maintains records using required vocabulary and formats |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language and appropriate non-verbal features to provide relevant information |
| Numeracy | <ul style="list-style-type: none"> Interprets mathematical information to finalise financial obligations and measure work outputs against projections |
| Self-management | <ul style="list-style-type: none"> Understands own responsibilities and considers implications of these when negotiating, planning and undertaking work |

| SKILL | DESCRIPTION |
|---------------------------|---|
| Teamwork | <ul style="list-style-type: none">• Collaborates with others as part of familiar routine activities and contributes to specific activities |
| Problem solving | <ul style="list-style-type: none">• Reflects on outcomes to identify opportunities for improvement |
| Planning and organising | <ul style="list-style-type: none">• Sequences and schedules required tasks, monitors implementation and manages relevant communication |
| Initiative and enterprise | <ul style="list-style-type: none">• Adheres to organisational policies and procedures and legislative requirements• Identifies importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how• Uses active listening and questioning to elicit views and opinions of others |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG417 Apply project life cycle management processes.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG428 Apply project life cycle management processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- assist in implementing project life cycle management process during at least two projects.

In the course of above, the candidate must:

- work with others to plan and document a project based on organisational parameters
- examine impact that project changes could have on final outcomes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- basic project governance models
- project charter
- project life cycle stages, phases and structures relevant to industry and project
- project planning documents and formats relevant to industry and context
- organisational strategies and goals in relation to the project
- organisational financial, legal and contractual obligations
- methods to prepare project budgets
- various types of project initiation documentation
- types of project logs and registers in use in this context.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of project documentation, including information about life cycle processes

- workplace documentation and resources
- relevant legislation, regulations, standards and codes.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG429 Apply project stakeholder engagement techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist in managing stakeholder relationships during a project. It involves ensuring timely and appropriate involvement of key individuals, organisations and groups throughout the project.

The unit applies to individuals who are project assistants working in a project support role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assist in identifying and addressing stakeholder interests | 1.1 Assist in identifying stakeholders relevant to project objectives 1.2 Divide stakeholder interests and assist in determining forms of engagement 1.3 Assist in identifying and supporting ways to address differing stakeholder interests |
| 2. Assist stakeholder communications | 2.1 Assist in negotiating agreement on project communication method, and content and timing of stakeholder engagement 2.2 Provide support for communication of information within authority levels, by identifying and addressing variances |
| 3. Participate in stakeholder | 3.1 Establish and confirm stakeholder behaviour expectations and communication needs |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|---|
| engagement | 3.2 Confirm and conduct stakeholder engagement according to project objectives and roles |
| 4. Review stakeholder communication | 4.1 Discuss with stakeholders relevant staff and own performance review according to project expectations, objectives and roles 4.2 Identify and document relevant staff and own development needs and opportunities |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets textual information to determine and adhere to objectives |
| Writing | <ul style="list-style-type: none"> Documents findings on communication needs using required formats and structure |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear and detailed language to provide relevant information Uses active listening and questioning techniques to elicit views and opinions of others |
| Initiative and enterprise | <ul style="list-style-type: none"> Understands how own role meshes with others and contributes to broader work goals |
| Teamwork | <ul style="list-style-type: none"> Identifies importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how Collaborates with others as part of familiar routine activities and contributes to specific activities Uses interpersonal skills to build rapport, negotiate agreement and maintain positive working relationships |
| Planning and organising | <ul style="list-style-type: none"> Uses analytical skills to identify stakeholders and determine their needs Follows pre-determined plans to achieve required outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG418 Apply project stakeholder engagement techniques.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG429 Apply project stakeholder engagement techniques

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- assist in conducting stakeholder engagements and communication during at least two projects.

In the course of above, the candidate must:

- work with others to establish various stakeholders needs and interests
- engage with project stakeholders using effective interpersonal skills and appropriate methods of communication
- select and use communications methods relevant to the project needs and stakeholder expectations.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- different types of stakeholders
- different levels of stakeholder engagement on projects
- techniques and strategies for stakeholder engagement
- interests and expectations of stakeholders
- common problems leading to variances in stakeholder engagement.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- project documentation detailing stakeholder engagement
- examples of stakeholder engagement activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG430 Undertake project work

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to undertake a minor project or a section of a larger project. It covers developing a project plan, administering and monitoring the project, finalising the project and reviewing the project to identify lessons learned for application to future projects.

The unit applies to individuals who play a significant role in ensuring a project meets timelines, quality standards, budgetary limits and other requirements set for the project.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish project parameters | 1.1 Identify project scope 1.2 Define project stakeholders 1.3 Seek clarification from delegating authority of issues related to project and project parameters 1.4 Identify responsibilities of relevant stakeholders and reporting requirements 1.5 Clarify relationship of project to other projects and to the objectives of the organisation 1.6 Identify availability and access of resources for undertaking the project |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|--|
| 2. Develop project plan | 2.1 Identify risks and develop a risk management plan for project, including Work Health and Safety (WHS) 2.2 Develop project budget and timeframe and seek approval from relevant stakeholders 2.3 Consult team members and apply their views in planning the project 2.4 Identify and access appropriate project management tools 2.5 Develop project plan according to project parameters and deliverables 2.6 Finalise project plan and gain necessary approvals to commence project according to documented plan |
| 3. Administer and monitor project | 3.1 Communicate to project team members their responsibilities and project requirements 3.2 Establish and maintain required recordkeeping systems throughout the project 3.3 Implement and monitor plans for managing the project 3.4 Undertake risk management as required |
| 4. Finalise and review project | 4.1 Complete financial recordkeeping associated with project and confirm according to agreed budget 4.2 Complete project documentation and obtain sign-offs for concluding project 4.3 Review project outcomes and processes against the project scope and plan 4.4 Document feedback and suggested improvements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|----------|---|
| Reading | <ul style="list-style-type: none"> Organises, evaluates and critiques ideas and information from a range of complex texts |
| Writing | <ul style="list-style-type: none"> Develops plans, reports and recommendations using vocabulary, structure and conventions appropriate to text Establishes and maintains records according to organisational requirements |
| Numeracy | <ul style="list-style-type: none"> Uses formal and some informal, oral and written mathematical language and representation to prepare and communicate budgetary and financial |

| SKILL | DESCRIPTION |
|-------------------------|---|
| | information |
| Oral communication | <ul style="list-style-type: none"> Participates in verbal discussions using clear language and appropriate features to present or seek information Using listening and questioning skills to seek information and confirm understanding |
| Self-management | <ul style="list-style-type: none"> Identifies and responds to organisational and legislative/regulatory requirements |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate communication protocols and practices to ensure shared understanding of project roles and expectations Uses collaborative techniques to engage stakeholders in consultations and negotiations |
| Planning and organising | <ul style="list-style-type: none"> Develops and implements plans to manage projects that involve diverse stakeholders with potentially competing demands Systematically gathers and analyses all relevant information and evaluates options to make informed decisions Evaluates outcomes of decisions to identify opportunities for improvement |
| Technology | <ul style="list-style-type: none"> Uses digital technologies and applications to access, organise and share information |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG522 Undertake project work.

Supersedes but is not equivalent to BSBADM407 Administer projects.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG430 Undertake project work

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- undertake project work on a minor project or a section of a larger project.

In the course of the above, the candidate must:

- confirm the quality of project outcomes according to expectations of the organisation
- consult and communicate with relevant stakeholders to generate input and engagement in planning, implementing and reviewing the project
- provide support to team members to enable them to achieve deliverables and to transition them as appropriate at completion of the project.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- project management tools
- types of documents and other sources of information commonly used in defining the parameters of a project
- mission, goals, objectives and operations of the organisation
- relevant legislation and regulations, including work health and safety (WHS) requirements, for project planning
- project management processes according to policies and procedures of the organisation and including:
 - lines of authority and approvals
 - quality assurance
 - human resources
 - budgets and finance
 - risk management
 - recordkeeping

- reporting.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation, regulations, standards and codes
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG530 Manage project scope

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to determine and manage project scope. It involves obtaining project authorisation, developing a scope management plan, and managing the application of project scope controls.

The unit applies to individuals responsible for managing and leading a project in an organisation, business or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Conduct project authorisation activities | 1.1 Develop and confirm procedures for project authorisation with an appropriate authority 1.2 Obtain authorisation to expend resources 1.3 Confirm project delegations and authorities in project governance arrangements |
| 2. Define project scope | 2.1 Identify and negotiate project boundaries with relevant stakeholders 2.2 Establish measurable project benefits, outcomes and outputs 2.3 Establish a shared understanding of desired project outcomes with relevant stakeholders |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.4 Document scope management plan |
| 3. Manage project scope control process | 3.1 Implement agreed scope management procedures and processes 3.2 Monitor impact of scope changes within established time, cost and quality constraints according to change control procedures 3.3 Identify and document scope management issues and recommend improvements for future projects |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses information from a range of complex texts |
| Writing | <ul style="list-style-type: none"> Develops project documentation and procedures using formats and language appropriate to context |
| Oral Communication | <ul style="list-style-type: none"> Participates in discussions and negotiations using clear language and appropriate non-verbal features Uses active listening and questioning to elicit views and opinions of others |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical information to determine project timelines and measure outcomes against project scope |
| Initiative and enterprise | <ul style="list-style-type: none"> Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment |
| Teamwork | <ul style="list-style-type: none"> Identifies and uses appropriate conventions and protocols when communicating with diverse stakeholders Collaborates with others to achieve joint outcomes, playing an active role in negotiating and facilitating agreement |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules complex activities, monitors implementation and manages relevant communications Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account Uses experience to reflect on ways variables impact outcomes and identify future improvements |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG511 Manage project scope.

Supersedes but is not equivalent to BSBPMG602 Direct the scope of a project program.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG530 Manage project scope

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project scope on at least two occasions.

In the course of the above, the candidate must:

- collaborate with stakeholders to produce a scope-management plan
- review and document scope-management implementation and recommend improvements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- components of a project scope-management plan
- factors likely to impact the project scope
- formal change-control processes
- methods for measuring work outcomes and progress against plans
- methods for segmenting and documenting a work breakdown structure
- problem areas likely to be encountered in scope management
- procedures for reporting scope change
- project life cycle and the significance of scope management
- project management tools used for managing scope
- roles and responsibilities of project manager in relation to project planning
- types of project initiation documentation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation used to document and manage project scope
- examples of feedback from project stakeholders regarding management of project scope.
-

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG531 Manage project time

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage time during projects. It involves determining and implementing the project schedule and assessing time management outcomes.

The unit applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine project schedule | 1.1 Develop work breakdown structure with sufficient detail to enable effective planning and control 1.2 Estimate duration and effort, sequence and dependencies of tasks, to achieve project deliverables 1.3 Use project scheduling tools and techniques to identify schedule impact on project time management, resource requirements, costs and risks 1.4 Contribute to achieving an agreed schedule baseline and communication of the schedule to stakeholders |
| 2. Implement project schedule | 2.1 Implement mechanisms to measure, record and report progress of activities according to agreed schedule |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|--|
| | 2.2 Conduct ongoing analysis to identify baseline variance 2.3 Analyse and forecast impact of changes to the schedule 2.4 Review progress throughout project life cycle and implement agreed schedule changes 2.5 Develop responses to potential or actual schedule changes and implement them to maintain project objectives |
| 3. Assess time management outcomes | 3.1 Review schedule performance records to determine effectiveness of time management activities 3.2 Identify and document time management issues and recommend improvements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies, interprets and analyses textual information obtained from a range of sources |
| Writing | <ul style="list-style-type: none"> Drafts and develops documentation required for project scheduling and reporting using appropriate formats and language |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear and detailed language and appropriate non-verbal features to convey expectations and advise others on progress |
| Numeracy | <ul style="list-style-type: none"> Calculates time requirements for project scheduling Uses basic mathematical formula to determine costs and other necessary resources |
| Teamwork | <ul style="list-style-type: none"> Identifies requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience |
| Planning and organising | <ul style="list-style-type: none"> Plans and schedules complex activities, monitors implementation and manages relevant communication Monitors actions against goals, adjusting plans and resources where necessary Uses analytical skills to review and evaluate process and decide on future improvements |
| Technology | <ul style="list-style-type: none"> Uses digital applications to access, organise, integrate and share relevant information in effective ways |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG512 Manage project time.

Supersedes but is not equivalent to BSBPMG603 Direct time management of a project program.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG531 Manage project time

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project time on at least two occasions.

In the course of the above, the candidate must:

- develop a project schedule using project management tools and techniques
- conduct a review of project scheduling and recommend improvements for the future.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- estimation techniques to determine task duration and resource effort
- procedures for identifying critical path
- procedures for managing project baselines, establishment and variance
- project life cycle phases
- best-practice time management methodologies, their capabilities, limitations, applications and outcomes
- key tools for project scheduling
- work breakdown structures and how they apply to project schedules.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of project schedules, reports and feedback from project stakeholders regarding time management.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG532 Manage project quality

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage quality within projects. It involves determining quality requirements, implementing quality control and assurance processes, and using review and evaluation to make quality improvements in current and future projects.

The unit applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine quality requirements | 1.1 Identify quality objectives and standards with input from relevant stakeholders 1.2 Develop quality metrics for the project and any product output in a quality management plan 1.3 Select quality management methods and tools for resolving quality issues 1.4 Consult with project team and stakeholders on quality requirements |
| 2. Implement quality processes | 2.1 Perform quality assurance audit of project processes for compliance with agreed plans |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.2 Assess quality control of project and product output according to agreed quality specifications 2.3 Identify causes of variance to quality metrics and undertake remedial action 2.4 Maintain a quality management system for timely recording of quality audit data |
| 3. Implement project quality improvements | 3.1 Review processes and implement agreed changes continually throughout the project life cycle 3.2 Review project outcomes against performance requirements 3.3 Identify and document lessons learned and recommended improvements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies, analyses and assesses textual information obtained from a range of sources and determines how content may be applied to requirements |
| Writing | <ul style="list-style-type: none"> Develops and documents quality requirements for project plan Records results of quality audits according to organisational requirements |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language and appropriate non-verbal features to provide and seek relevant information Uses active listening and questioning techniques to elicit views and opinions of others |
| Numeracy | <ul style="list-style-type: none"> Interprets information to determine measurable objectives Interprets numerical information to measure outcomes against objectives Uses analytical skills to review and evaluate process and decide on future improvements |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for identifying and following policies, procedures and standards |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate communication practices in a range of work contexts Collaborates with others to foster shared understanding of quality requirements |

| SKILL | DESCRIPTION |
|-------------------------|---|
| Planning and organising | <ul style="list-style-type: none">Sequences and schedules complex activities, monitors actions against goals, adjusting plans and resources where necessary |
| Technology | <ul style="list-style-type: none">Uses digital applications to access, organise, integrate and share relevant information in effective ways |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG513 Manage project quality.

Supersedes but is not equivalent to BSBPMG605 Direct quality management of a project program.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG532 Manage project quality

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project quality on at least two occasions.

In the course of the above, the candidate must:

- document a quality-management plan
- implement quality control and assurance processes for a defined project using a range of tools and methodologies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- quality management theory
- relevant project quality standards that apply in the organisation
- quality assurance and control techniques, key tools and methodologies
- roles and responsibilities of quality management personnel
- methods for managing continuous improvement.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- project documentation including quality criteria, evidence of quality monitoring and improvement practices.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG533 Manage project cost

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify, analyse and refine project costs to produce a budget, and to use this budget as the principal mechanism to control project cost.

The unit applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine project costs | 1.1 Identify resource requirements for individual tasks identified in the work breakdown structure in consultation with relevant stakeholders 1.2 Estimate project costs for project budget to be prepared within agreed tolerances 1.3 Develop a project budget 1.4 Develop a cost-management plan for project finances according to scope of responsibility |
| 2. Monitor and control project costs | 2.1 Implement agreed financial-management processes and procedures for monitoring actual expenditure against budget 2.2 Identify cost variations and evaluate alternative actions |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|--|
| | 2.3 Implement and monitor agreed actions for maintaining financial objectives 2.4 Provide accurate and timely financial reports |
| 3. Complete cost-management processes | 3.1 Conduct activities to signify financial completion according to task and organisational requirements 3.2 Review project outcomes using available records 3.3 Review cost-management issues and document improvements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses textual information from a range of sources Reviews and interprets information related to budget |
| Writing | <ul style="list-style-type: none"> Drafts and develops documents using appropriate format and language for context |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language and appropriate tone and syntax to provide relevant information Uses active listening and questioning to elicit views and opinions of others |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical formulae to calculate resources against predetermined budgets, solve variances and finalise project costs |
| Initiative and enterprise | <ul style="list-style-type: none"> Adheres to organisational policies and procedures and understands responsibilities of own role |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to confirm requirements, seek guidance or share information |
| Planning and organising | <ul style="list-style-type: none"> Plans and schedules complex activities, monitors implementation and manages relevant communication Monitors actions against goals, adjusting plans and resources where necessary Uses analytical skills to review and evaluate process and decide on future improvements Uses digital applications to access, organise, integrate and share relevant information in effective ways |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG514 Manage project cost.

Supersedes but is not equivalent to BSBPMG604 Direct cost management of a project program.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG533 Manage project cost

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project cost on at least two occasions.

In the course of the above, the candidate must:

- monitor costs across a project's life cycle including solving cost variations and analysing possible alternatives
- record expenditure, create accurate financial reports and review cost-management processes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- appropriate budgeting processes, tools and techniques
- methods and tools for costing and cost analysis
- strategies for managing costs and their application in different situations
- processes for reviewing costs against outcomes
- cost-analysis methods and tools for identifying and evaluating cost variations
- key organisational policies and procedures applicable to this role.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources, including budgets and other financial documents

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG534 Manage project human resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage human resources related to projects. It involves planning for human resources, implementing personnel training and development, and managing the project team.

The unit applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan human resources relevant to projects | 1.1 Identify resource requirements for each project task 1.2 Match skills and knowledge of individuals and groups with project tasks 1.3 Allocate personnel to the project according to planned work outputs and project timeline 1.4 Support performance of personnel using human resources management (HRM) methods and tools |
| 2. Implement project personnel training and development | 2.1 Define and communicate clear project role descriptions to organisational personnel 2.2 Plan and implement training and development of project team members |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.3 Measure individuals' performance against agreed criteria and initiate actions for shortfalls in performance |
| 3. Lead project team | 3.1 Implement processes for improving individual performance and overall project effectiveness 3.2 Monitor and report, for remedial action, internal and external influences on individual and project team performance and morale 3.3 Implement procedures for interpersonal communication, counselling, and conflict resolution 3.4 Identify and manage inter-project and intra-project resource conflict |
| 4. Finalise human resource activities related to projects | 4.1 Disband project team according to organisational policies and procedures 4.2 Identify and document human resource issues and recommended improvements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies textual information obtained from a range of sources and determines how content may be applied to requirements |
| Writing | <ul style="list-style-type: none"> Develops plans, role descriptions and reports using clear, specific and industry-related terminology, appropriate structures and conventions Documents personnel requirements, results of performance measurements and improvement recommendations |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language and appropriate non-verbal features Uses active listening and questioning to elicit views and opinions of others and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical formulae to calculate resources against project requirements and to measure work output against predetermined criteria Uses analytical skills to review performance and decide on actions needed |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies and adheres to organisational policies and procedures Analyse impact of variables outcomes to gain insights into concepts that may be adapted in future situations |

| SKILL | DESCRIPTION |
|-------------------------|--|
| Teamwork | <ul style="list-style-type: none">• Collaborates with co-workers to negotiate and facilitate shared understanding of individual roles and group objectives• Manages workplace conflict by recognising contributing factors and implementing resolution strategies |
| Planning and organising | <ul style="list-style-type: none">• Develops plans to identify project responsibilities and needs, and allocate project personnel, with an awareness of how this contributes to overall project goals |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG515 Manage project human resources.

Supersedes but is not equivalent to BSBPMG606 Direct human resources management of a project program.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG534 Manage project human resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project human resources on at least two occasions.

In the course of the above, the candidate must:

- identify and organise project personnel training and development
- manage project personnel to achieve project outcomes
- apply human resource management (HRM) methods, techniques and tools to the project.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- tool and techniques to identify resource requirements including required project personnel levels and competencies
- human resource management (HRM) methods, techniques and tools
- relevant training and development methods
- strategies for managing project human resources and their application to different situations
- procedures for interpersonal communication, counselling, and conflict resolution
- processes used to measure individuals' performance against agreed criteria
- techniques for managing and improving performance.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- project documentation
- workplace documentation and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG535 Manage project information and communication

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to link people, ideas and information at all stages in the project life cycle. Project communication management ensures timely and appropriate generation, collection, dissemination, storage and disposal of project information through formal structures and processes.

The unit applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan information and communication processes | 1.1 Identify and analyse information requirements of the project 1.2 Develop a communication management plan according to project objectives 1.3 Establish a designated project-management information system |
| 2. Implement project information and communication processes | 2.1 Manage generation, gathering, storage, retrieval, analysis and dissemination of information by project staff and stakeholders 2.2 Implement, modify, monitor and control designated information-validation processes 2.3 Implement and maintain communication networks 2.4 Identify and resolve communication and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | information-management system issues |
| 3. Assess information and communication outcomes | 3.1 Finalise and archive records according to agreed project information ownership and control requirements 3.2 Review project outcomes for effectiveness of management information and communication processes and procedures 3.3 Develop and document recommended improvements for application in future projects |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and analyses complex texts from a range of sources |
| Writing | <ul style="list-style-type: none"> Develops project documents using vocabulary, structure and conventions appropriate to text |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language and appropriate non-verbal features Uses active listening and questioning to confirm understanding and agreement |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies responsibilities and boundaries of own role |
| Teamwork | <ul style="list-style-type: none"> Identifies requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules complex activities, monitors implementation and manages relevant communication Uses problem-solving techniques to analyse and resolve issues Evaluates outcomes of decisions to identify opportunities for improvement Uses digital tools to access, organise and analyse complex data |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG516 Manage project information and communication.

Supersedes but is not equivalent to BSBPMG607 Direct communications management of a project program.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG535 Manage project information and communication

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project information and communication on at least two occasions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- alternative communication methods and media and their application on various projects
- effective project-management information systems and their various applications
- methods used to evaluate information systems and communication processes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- project communication and information management documentation
- examples of how communication was managed on projects.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG536 Manage project risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage risks that may impact achievement of project objectives. It involves identifying, analysing, treating and monitoring project risks, and assessing risk management outcomes.

The unit applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify project risks | 1.1 Identify risk objectives and standards, with input from stakeholders 1.2 Identify project risk context to inform risk management processes 1.3 Identify project risks using valid and reliable risk identification methods |
| 2. Analyse project risks | 2.1 Identify risk analysis classification criteria and apply to agreed risk ranking system 2.2 Use risk analysis processes, within delegated authority, to analyse and qualify any risks, threats and opportunities 2.3 Identify risk priorities in agreement with project client and other |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | stakeholders 2.4 Document risk analysis outcomes for inclusion in risk register and risk management plan |
| 3. Establish risk treatments and controls | 3.1 Identify and document existing risk controls 3.2 Analyse risk treatment options using agreed consultative methods 3.3 Record and implement agreed risk treatments 3.4 Update risk plans and allocate risk responsibilities to project team members |
| 4. Monitor and control project risks | 4.1 Establish risk review processes 4.2 Monitor risk environment and identify changed circumstances impacting project risks 4.3 Evaluate risk responses to changed environment 4.4 Implement agreed risk responses and modify plans |
| 5. Assess risk management outcomes | 5.1 Review project outcomes for effectiveness of risk-management processes and procedures 5.2 Develop recommended improvements for application in future projects 5.3 Identify and document risk management issues and recommended improvements for application to future projects |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and critically analyses complex texts from a range of sources and determines how content may be applied according to organisational requirements |
| Writing | <ul style="list-style-type: none"> Documents risk analysis and risk controls using required formats and structure Modifies and updates workplace documentation according to requirements |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language to provide and seek information Uses active listening and questioning techniques to confirm understanding |

| SKILL | DESCRIPTION |
|-------------------------|--|
| Numeracy | <ul style="list-style-type: none">Analyses numerical data to identify project risk levels and rank risks according to agreed system of classification |
| Self-management | <ul style="list-style-type: none">Identifies and adheres to organisational policies and standardsConsiders own role in terms of its contribution to broader goals of work environment |
| Teamwork | <ul style="list-style-type: none">Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share informationIdentifies requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience |
| Planning and organising | <ul style="list-style-type: none">Identifies and develops approaches to risk management and implements complex tasks to achieve outcomesAnalyses information to make decisions, involving others when appropriateUses formal and informal processes to monitor implementation of decisions and reflect on outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG517 Manage project risk.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG536 Manage project risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project risk on at least two occasions.

In the course of the above, the candidate must:

- conduct effective risk management processes for a project of sufficient complexity
- apply risk management techniques, strategies and tools.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- project risks in a range of risk categories
- key components of a risk management plan
- relevant project risk controls
- industry sector risk classifications and different risk contexts
- organisational and industry standard risk frameworks
- project risk-management processes and procedures
- characteristics, techniques and applications of quantitative and qualitative risk management techniques and approaches.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources
- feedback from project stakeholders about how risks were managed.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG537 Manage project procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to undertake procurement in projects.

The unit applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine procurement requirements and processes | 1.1 Identify project objectives, needs and budget 1.2 Identify procurement requirements 1.3 Establish agreed procurement management plan 1.4 Identify potential suppliers 1.5 Obtain information from potential suppliers capable of fulfilling procurement requirements 1.6 Determine selection processes and selection criteria, and communicate to suppliers 1.7 Obtain approvals from relevant stakeholders for procurement processes to be used |
| 2. Conduct procurement activities | 2.1 Communicate agreed proposals and specifications to potential suppliers and confirm understanding of project objectives |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.2 Seek supplier responses and evaluate according to proposal requirements 2.3 Select preferred supplier according to legal requirements and agreed selection criteria 2.4 Negotiate with preferred supplier and agree on terms and conditions of supply |
| 3. Monitor procurement | 3.1 Implement procurement management plan and arrange regular meetings with supplier to track progress 3.2 Maintain procurements records and documentation according to organisational policies and procedures 3.3 Monitor completion of task against agreed terms and conditions 3.4 Review progress and manage agreed variations 3.5 Identify and report procurement management challenges and implement agreed remedial actions |
| 4. Manage procurement finalisation procedures | 4.1 Conduct finalisation activities and confirm deliverables meet contracted requirements 4.2 Review project outcomes using procurement records and information and determine effectiveness of procurement processes and procedures 4.3 Seek and respond to feedback from relevant stakeholders on management of project procurement 4.4 Document lessons learned and recommended improvements for future projects |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets, evaluates and critiques ideas and information from a range of complex texts |
| Writing | <ul style="list-style-type: none"> Develops plans using vocabulary, structure and conventions appropriate to text Creates documents for internal and external use, using vocabulary and structure suitable for audience and context Drafts requests for approvals using organisational formats |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear language to seek and provide information, or request approvals Uses active listening and questioning techniques to confirm |

| SKILL | DESCRIPTION |
|-------------------------|---|
| | understanding |
| Numeracy | <ul style="list-style-type: none">• Recognises cost parameters and interprets numerical information accordingly• Calculates changes to timelines resulting from changes to plan |
| Self-management | <ul style="list-style-type: none">• Identifies responsibilities and boundaries of own role |
| Teamwork | <ul style="list-style-type: none">• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information• Uses interpersonal skills to negotiate acceptable outcomes |
| Planning and organising | <ul style="list-style-type: none">• Plans and organises complex activities, monitors implementation and manages relevant communication• Resolves problems and makes decisions based on analysis of options against set criteria and targets |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG518 Manage project procurement.

Supersedes but is not equivalent to BSBPMG609 Direct procurement and contracting for a project program.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG537 Manage project procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project procurement on at least two occasions.

In the course of above, the candidate must:

- determine procurement requirements and produce a procurement management plan
- carry out procurement and contracting activities according to agreed processes
- monitor activities across a project's life cycle and resolve issues that could affect achievement of project objectives
- create and maintain procurement records and documentation according to requirements of project and organisation
- document a review of procurement management processes and procedures
- identify and act according to probity and project governance constraints.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- project objectives, needs and budget
- procurement management plan
- vendor selection criteria
- legal obligations
- probity and project governance constraints that relate to project procurement in a project and industry context
- selection processes and selection criteria
- project life cycle
- conflict resolution and management.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to procurement and contracts.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG538 Manage project stakeholder engagement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage stakeholder relationships.

The unit applies to individuals responsible for managing and leading a project in an organisation, business or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assess stakeholder interests | 1.1 Identify project objectives and relevant stakeholders 1.2 Establish stakeholder interests and expectations and determine forms of engagement 1.3 Determine and agree with relevant stakeholders on forms of engagement, communication methods, project content, budget and timelines 1.4 Identify and apply actions to address differing interests 1.5 Consider and advise stakeholders on project management issues |
| 2. Monitor stakeholder engagement | 2.1 Assign roles and responsibilities to team members according to interests and expectations and confirm defined project roles are followed 2.2 Develop knowledge management systems to capture team |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>progress, insights and experiences</p> <p>2.3 Conduct and lead stakeholder performance reviews</p> <p>2.4 Identify and address team member development needs and opportunities</p> <p>2.5 Support development of interpersonal skills of the team for stakeholder engagement</p> |
| 3. Review and manage stakeholder engagement | <p>3.1 Communicate information as planned and according to authority levels, identifying and addressing variances</p> <p>3.2 Seek and respond to feedback from relevant stakeholders on management of stakeholder engagement</p> <p>3.3 Document identified improvements and feedback received for future management of stakeholder engagements</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets workplace documentation to determine relevant information |
| Writing | <ul style="list-style-type: none"> Documents information about stakeholder interests and communication needs using appropriate vocabulary and formats |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear and detailed language to provide and seek information Uses active listening and questioning to confirm understanding |
| Self-management | <ul style="list-style-type: none"> Identifies and works according to role parameters |
| Teamwork | <ul style="list-style-type: none"> Identifies requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience Collaborates with others to achieve joint outcomes, playing an active role in facilitating and leading activities |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for decisions in complex situations involving multiple variables and constraints Uses analytical skills to identify and address problems |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG519 Manage project stakeholder engagement.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG538 Manage project stakeholder engagement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project stakeholder engagements on at least two occasions.

In the course of above, the candidate must:

- develop and implement stakeholder engagement for a project
- implement a range of appropriate stakeholder communication mechanisms
- demonstrate team leadership for project team and stakeholders.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- stakeholder engagement approaches
- stakeholder interests and expectations
- stakeholder engagement methods
- stakeholder engagement theory
- types of project stakeholders
- conducting performance reviews.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of project management documentation for stakeholder engagement
- records of project team leadership in stakeholder engagement activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG539 Manage project governance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish and implement project governance. It involves identifying, applying, monitoring and reviewing project governance.

It applies to individuals responsible for managing and leading a project in an organisation, business or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify project governance structure | 1.1 Identify project scope, timeline, resources and budget 1.2 Identify stakeholders required for project governance and decision-making 1.3 Assign governance roles and responsibilities to relevant stakeholders and establish delegated authorities 1.4 Develop and communicate governance plan to relevant stakeholders |
| 2. Develop relevant documents and apply project governance | 2.1 Create a decision-making framework 2.2 Provide information on governance planning to team 2.3 Identify potential risks and develop risk management plan 2.4 Plan for any change and establish change management |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------|---|
| | <p>processes</p> <p>2.5 Develop processes to manage budget and resources</p> <p>2.6 Develop relevant documents related to communication, conflict management and stakeholder management</p> <p>2.7 Seek approval from relevant stakeholders on all project documentation</p> |
| 3. Monitor project governance | <p>3.1 Develop knowledge management systems to capture progress, insights and experiences</p> <p>3.2 Track progress against established timeline and budget and confirm deadlines are being met</p> <p>3.3 Communicate to organisation and project authorities on performance and issues arising from governance arrangements</p> |
| 4. Review project governance | <p>4.1 Analyse and review project governance impact on achieving project objectives</p> <p>4.2 Seek feedback from relevant stakeholders on project governance</p> <p>4.3 Document lessons learned, identified improvements and recommendations to assist future projects</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Evaluates and critiques ideas and information from a range of sources and determines how content may be applied according to organisational requirements |
| Writing | <ul style="list-style-type: none"> Develops plans, reports and recommendations using vocabulary, structure and conventions appropriate to text |
| Oral Communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using clear and detailed language to provide relevant information Uses active listening and questioning to confirm understanding |
| Self-management | <ul style="list-style-type: none"> Recognises and responds to explicit and implicit organisational procedures and protocols Takes responsibility for high-impact decisions in complex situations |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information Collaborates with others to achieve joint outcomes, playing an active |

| SKILL | DESCRIPTION |
|-------------------------|--|
| | role in facilitating effective group interaction and agreement |
| Problem-solving | <ul style="list-style-type: none">• Manages conflict in workplace through recognising contributing factors and implementing resolution strategies• Recognises and addresses complex problems involving multiple variables |
| Planning and organising | <ul style="list-style-type: none">• Organises time and effort around priorities and results, focusing beyond immediate tasks to consider work performance of group• Uses experience to reflect on how variables impact decision outcomes, and to gain insights into effective decision-making in different contexts |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG520 Manage project governance.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG539 Manage project governance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage project governance on at least one occasion.

In the course of above, the candidate must:

- develop and implement a governance plan
- demonstrate effective team leadership
- monitor and evaluate project governance structure.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- project scope, timeline, resources and budget
- escalation and issues management models
- frameworks for authority delegations
- organisation or industry governance models in context of the project
- project governance plans
- methods to moderate and solve conflicts in context of project management
- decision-making framework
- communication plan
- risk management plan
- conflict management strategies
- project management plan
- stakeholder management plan
- knowledge management systems.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of project governance documentation
- records of governance implementation in stakeholder and team activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG540 Manage project integration

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to integrate and balance overall project management functions and to align and track project objectives to comply with organisational goals, strategies and objectives.

The unit applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish project | 1.1 Identify, clarify and prepare project initiation documentation 1.2 Identify stakeholders with decision making authority on project 1.3 Establish client requirements and needs 1.4 Identify relationship between the project and broader organisational strategies and goals 1.5 Negotiate and document project objectives, outcomes and benefits 1.6 Establish project governance structure with stakeholders and project authority 1.7 Prepare and submit project charter for approval by relevant authorities |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2. Undertake project planning and design processes | 2.1 Establish project objectives 2.2 Identify project stages and key requirements for stage completion against client requirements and project objectives 2.3 Analyse project management functions to identify interdependencies and impacts of constraints 2.4 Develop a project management plan that integrates all project-management functions with associated plans and baselines 2.5 Establish tools to monitor and control planned activity 2.6 Negotiate approval of project plan with relevant stakeholders and project authority |
| 3. Monitor project | 3.1 Implement and monitor project according to project scope, time and budget 3.2 Resolve conflicts affecting attainment of project objectives with relevant stakeholders 3.3 Confirm project records are updated against project deliverables at required intervals 3.4 Analyse and submit status reports on project progress and identify issues with relevant stakeholders and project authorities 3.5 Analyse and submit impact analysis of change requests for approval 3.6 Maintain relevant project logs and registers for project audit |
| 4. Review project | 4.1 Identify and allocate project finalisation activities 4.2 Confirm project products and associated documentation are prepared for handover to client in a timely manner 4.3 Finalise financial, legal and contractual obligations 4.4 Seek feedback from relevant stakeholder and project authorities on project implementation, management and integration 4.5 Document feedback received to improve future projects |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------|--|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Develops and maintains project documentation using formats and language appropriate to context |

| SKILL | DESCRIPTION |
|-------------------------|---|
| Oral Communication | <ul style="list-style-type: none">• Participates in verbal exchanges using clear and detailed language to provide and seek information• Uses active listening and questioning to confirm understanding |
| Numeracy | <ul style="list-style-type: none">• Uses a wide range of mainly formal and some informal, oral and written mathematical language and representation to communicate mathematically |
| Self-management | <ul style="list-style-type: none">• Complies with organisational requirements |
| Teamwork | <ul style="list-style-type: none">• Selects and uses appropriate communication practices to seek or share information with stakeholders• Collaborates with others to achieve joint outcomes by playing an active role in facilitating effective group interaction and negotiating outcomes |
| Planning and organising | <ul style="list-style-type: none">• Organises time and effort around priorities and results• Sequences and schedules complex activities, monitors implementation and manages relevant communication• Identifies outcomes to contribute to future projects |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG521 Manage project integration.

Supersedes but is not equivalent to BSBPMG601 Direct the integration of projects.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG540 Manage project integration

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement and manage project integration on at least three occasions.

In the course of above, the candidate must:

- work closely with others to integrate all project management functions across a project life cycle according to organisational objectives
- negotiate with internal and external stakeholders
- create accurate project management documentation
- make suggestions for improvements to managing project integration in the future
- maintain established links to align project objectives with organisational objectives.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- project governance models and structure
- project initiation documentation
- tools to monitor and control planned activity
- range of methodologies to break project objectives into achievable project deliverables
- role of project life cycle stages, phases and structures relevant to industry and project context
- impact analysis methodologies
- key aspects of change requests
- organisational documentation for recording strategies and goals for integration processes
- project management plan.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG541 Manage complex projects

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify and manage projects which have been identified as complex in nature.

The unit applies to project managers who are involved in the management of complex projects.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate project complexity | 1.1 Identify criteria for determining project as complex 1.2 Assess complexity of project against complexity of past projects, where possible 1.3 Undertake analysis of causes that may impede project success 1.4 Establish strategies and minimise causes for project failing |
| 2. Assess complexities and establish procedures for managing complex projects | 2.1 Assess project plan and implementation details, and communicate roles and responsibilities to team members 2.2 Identify and apply a range of tools and frameworks based on established complexity approaches and systems concepts 2.3 Develop action plan for minimising complexities 2.4 Identify any risks and potential risks and develop risk |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | management strategies |
| 3. Monitor and review complex projects | 3.1 Identify and establish tools that assist in managing complex projects 3.2 Monitor the dimensions of complexity of project and project progress 3.3 Seek feedback from relevant stakeholders on project progress and project management skills 3.4 Incorporate feedback and develop actions for improving project progress and project management skills 3.5 Implement changes to project according to feedback received |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none"> Interprets, analyses and assesses textual and numerical information obtained from a wide range of sources and determines how content may be applied to a complex project situation |
| Numeracy | <ul style="list-style-type: none"> Interprets information to determine measurable dimensions of a complex project, such as time, cost, quality, objectives and performance Interprets numerical information to measure outcomes against objectives |
| Oral communication | <ul style="list-style-type: none"> Seeks relevant information and participates in verbal exchanges using clear language and appropriate non-verbal expression Uses active listening and questioning techniques to elicit views and opinions of others |
| Reading | <ul style="list-style-type: none"> Interprets, analyses and assesses textual and numerical information obtained from a wide range of sources and determines how content may be applied to complex projects |
| Writing | <ul style="list-style-type: none"> Develops and documents quality requirements for project plan Records results of quality audits according to organisational requirements |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate communication practices in a range of work contexts Collaborates with others to foster shared understanding of quality requirements |
| Initiative and | <ul style="list-style-type: none"> Takes responsibility for identifying and following policies, |

| Skill | Description |
|-------------------------|--|
| enterprise | <ul style="list-style-type: none">procedures and standardsTakes initiative to improve policies, procedures and standards in relation to complex projects |
| Planning and organising | <ul style="list-style-type: none">Sequences and schedules complex activities, monitors actions against goals, adjusting plans and resources where necessaryUses analytical skills to review and evaluate process and decide on future improvements |
| Problem solving | <ul style="list-style-type: none">Identifies a symptom from a causeApplies relevant analysis tools to aid the identification of actual causes |
| Self-management | <ul style="list-style-type: none">Understands self-limits and seeks advice from mentors to further development of competencies, skills and techniquesConducts investigations in a professional and respectful manner |
| Technology | <ul style="list-style-type: none">Identifies tools and technologies to assist in the identification and implementation of ongoing monitoring of complex projectsUses digital applications to access, organise, integrate and share relevant information in effective ways |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG541 Manage complex projects

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage a complex project on at least two occasions.

In the course of the above, the candidate must:

- demonstrate the competencies as a project manager to manage complex projects, including:
 - systems thinking and integration
 - strategy, business planning, portfolios and project management
 - lifecycle management, reporting and performance measurement
 - understanding organisational change and the wider business journey
 - innovation, creativity and design thinking
 - understanding enterprise architectures, business architectures and organisational architectures
 - leadership and communication
 - understanding organisational culture and human behaviours
- identify key features of complex projects
- monitor action plan in line with changes to the external environment to ensure action plan remains current.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- project manager competencies that assist in the management of complex projects
- industry standards and tools to assist in the establishment of policy, procedures, plans and processes related to the management of complex projects

- tools for analysis
- management complexity factors including:
 - governance complexity
 - stakeholder relationship complexity
 - project definition complexity
 - project delivery complexity
- complexity of new technology, products or services
- complexity of relevant external partners, suppliers
- complexity of strategic direction, politics and expectations
- complexity of external environmental changes, changes to strategy and business plans over an extended time
- complexity of diversity, societal, human behaviours and organisational culture.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant written information beyond the immediate project environment
- relevant stakeholders beyond the immediate project environment
- subject matter experts in the field in which the complex project is operating within.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG630 Enable program execution

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish parameters and enable a program to be undertaken effectively. It includes establishing both what the program will accomplish and how it will do so.

The unit applies to individuals who are program managers and those managing a suite of projects (a program). They operate within assigned authority levels, are responsible for own performance and sometimes the performance of others.

Individuals in this role may be operating within an organisation, business or as a consultant.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Envision the desired future state | 1.1 Identify program procurements, scope, timeline, budget, client expectations and organisational goals 1.2 Define and agree on description of the desired future state with pertinent stakeholders 1.3 Identify and explore with relevant stakeholders gaps between current state and desired future state 1.4 Identify and evaluate internal and external factors and issues likely to cause changes to the desired future state 1.5 Agree on desired future state and confirm alignment with |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | expected benefits |
| 2. Shape and sustain the program execution approach | 2.1 Identify program execution approach 2.2 Identify, monitor and evaluate internal and external factors and issues likely to cause changes to program execution approach 2.3 Review and make changes to program execution approach and confirm alignment with expected benefits 2.4 Communicate with relevant stakeholders changes required to transition from current state to future state and agree approach |
| 3. Establish program governance | 3.1 Prepare and seek approval from relevant stakeholders on business case for desired future state and program execution approach 3.2 Identify and develop program management structure 3.3 Identify and create policies, processes, and procedures for supporting management of program 3.4 Develop a knowledge management system to capture progress, insights, experiences and learnings |
| 4. Review program execution | 4.1 Finalise financial, legal and contractual obligations 4.2 Seek feedback from relevant stakeholders on management of project governance and established approaches 4.3 Document feedback received and identify improvements for future projects |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Develops and refines a range of program related documents using appropriate format, vocabulary and structure |
| Oral Communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using clear and detailed language to provide relevant information Uses active listening and questioning techniques to confirm understanding |
| Self-management | <ul style="list-style-type: none"> Develop organisational policies and procedures |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with relevant stakeholders to seek or share information |

| SKILL | DESCRIPTION |
|-------------------------|---|
| | <ul style="list-style-type: none">• Negotiates agreement with diverse stakeholders |
| Planning and organising | <ul style="list-style-type: none">• Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands• Sequences and schedules complex activities, monitors implementation and manages program execution |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG610 Enable program execution.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG630 Enable program execution

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- enable program execution on at least one occasion.

In the course of above, the candidate must:

- use advanced writing skills to document business case and other planning documents
- conceptualise, clarify and document future state descriptions
- monitor and evaluate processes and changed circumstances
- negotiate vision and detail requirements with stakeholders
- develop and document a program execution strategy, governance model and business case.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- methods used to construct future state scenarios
- internal and external factors and issues likely to cause changes to:
 - desired future state
 - program execution approach
 - business case
- business case development processes, documentation and presentation
- program execution approaches
- program governance models
- knowledge management system
- financial, legal and contractual obligations.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- examples of program documentation
- feedback from stakeholders, which reflects how program execution was managed for a program.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG631 Manage program delivery

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage program delivery. It ensures that the program is moving toward the accomplishment of its vision and the attainment of its expected benefits.

The unit applies to individuals who are program managers and those managing a suite of projects (a program). They operate within assigned authority levels, are responsible for their own performance and sometimes the performance of others.

Individuals in this role may be operating within an organisation, a business or as a consultant.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Resource and fund the program | 1.1 Determine, negotiate, document and communicate program resource requirements with key stakeholders 1.2 Identify and communicate funding requirements with relevant stakeholders 1.3 Identify and address funding issues and satisfy funding agent requirements |
| 2. Monitor program progress | 2.1 Establish monitoring and control systems and support delivery of desired outcomes 2.2 Report performance of constituent projects and other program |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>elements to key stakeholders</p> <p>2.3 Evaluate internal and external program contexts to identified improvement needs and opportunities</p> <p>2.4 Identify, evaluate and document actual and potential changes</p> <p>2.5 Communicate with relevant stakeholders and implement approved changes</p> |
| 3. Address legal and regulatory requirements | <p>3.1 Identify, document and communicate relevant legal and regulatory requirements to key stakeholders</p> <p>3.2 Identify and address potential and actual conflicts caused by legal and regulatory requirements</p> <p>3.3 Implement compliance policies, processes, and procedures</p> <p>3.4 Monitor breaches and conflicts according to legal and regulatory requirements</p> |
| 4. Manage program risks | <p>4.1 Identify program risks in consultation with relevant stakeholders</p> <p>4.2 Document and communicate to relevant stakeholders, risk management approach for the program and its constituent projects</p> <p>4.3 Analyse, prioritise and implement risk responses</p> <p>4.4 Monitor internal and external program contexts for circumstances that may affect program risks</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Records results of negotiations clearly and accurately Creates and updates program documentation using organisational formats and appropriate vocabulary |
| Oral Communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using language and features appropriate to audience Uses active listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Makes basic mathematical calculations to determine program funding and resource requirements |

| SKILL | DESCRIPTION |
|-------------------------|---|
| Self-management | <ul style="list-style-type: none">Monitors adherence to both explicit and implicit organisational policies and protocols and legislative or regulatory requirements |
| Teamwork | <ul style="list-style-type: none">Selects and uses appropriate conventions and protocols to communicate with relevant stakeholders to share informationCollaborates with others to achieve required outcomes, playing a leading role in facilitating effective interaction, influencing direction and negotiating agreement |
| Planning and organising | <ul style="list-style-type: none">Develops flexible plans for complex, high impact activities with strategic implications that involve diverse stakeholdersSequences and schedules complex activities, monitors implementation and manages program evaluationMakes critical and non-critical decisions in relatively complex situations, taking a range of factors into account |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG615 Manage program delivery.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG631 Manage program delivery

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage program delivery on at least one occasion.

In the course of above, the candidate must:

- conduct negotiations to resource and fund the program
- use software and data analysis methods to structure program data
- prepare a program risk management plan.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- evaluation and moderation methods
- relevant legislation and regulation
- resource types, characteristics and supply
- funding requirements
- monitoring and control systems
- compliance policies, processes, and procedures
- legal and regulatory requirements relating to monitoring breaches and conflicts
- program funding models
- risk management standards and methodology.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- access to workplace documentation for the management of program delivery
- feedback from stakeholders, which reflects on how a program was delivered.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG632 Manage program risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage risks that might affect program deliverables and organisational objectives. It covers directing the planning and management of program risks, managing risks to the overall program and assessing risk management outcomes for the program and the organisation.

The unit applies to individuals who are program managers, managing or directing a suite of projects (a program) and/or senior project managers.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Direct planning of program risk management | <ul style="list-style-type: none">1.1 Identify potential, actual and residual risks1.2 Select and modify program risk methodology to match the context for risk1.3 Consult with relevant stakeholders and identify, document and analyse program level risks1.3 Support and mentor project managers in the analysis, evaluation and treatment of risks1.4 Confirm risk management is transparent and dynamic across the program so that risks are assigned and managed in a timely manner |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 1.5 Develop and maintain a program risk-management system for effective management and communication of risks, controls, treatments and outcomes to stakeholders across the program |
| 2. Manage program risk | 2.1 Direct management of the program in accordance with agreed program risk-management plans 2.2 Review progress, analyse variance and initiate risk responses to achieve program objectives in dynamic risk environments 2.3 Confirm risks are monitored and assessed across the program at agreed intervals 2.4 Direct response to actuated program risk and confirm remedial actions are authorised with impact analysis according to program objectives |
| 3. Assess program risk-management outcomes | 3.1 Identify and document program residual risk and communicate to stakeholders any transferred liability at program completion 3.2 Review and analyse program outcomes to assess the effectiveness of the risk-management methodology 3.3 Seek feedback and respond to relevant stakeholders on risk management 3.4 Analyse, document and recommend lessons learned for application in other programs |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Documents results of consultations clearly and accurately to inform risk-management planning Documents risk-management outcomes using format and terminology appropriate to the audience |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using clear and detailed language and appropriate features, to provide relevant information Uses active listening and questioning techniques to confirm understanding |
| Teamwork | <ul style="list-style-type: none"> Identifies requirements of important communication exchanges, selecting appropriate channels, format and content to suit purpose and audience |

| SKILL | DESCRIPTION |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Develops systems and plans for complex, high impact activities that involve a diverse range of stakeholders with potentially competing demands• Sequences and schedules complex activities, monitors implementation, and adjusts activities or resources as required• Reviews outcomes considering results from a range of perspectives and identifying key concepts and principles that may be adaptable to future situations |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG616 Manage program risk.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG632 Manage program risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage program risk on at least one occasion.

In the course of above, the candidate must:

- direct the planning of program risk management, including:
 - assessing and selecting risk methods to suit risk context
 - directing identification, documentation and analysis of risks as basis for planning
 - directing, supporting and mentoring project managers in analysing, evaluation and treatment of risks
 - confirming risk management is transparent and timely
 - developing and maintaining a risk management system across the program
- manage program risk, including:
 - managing the program
 - reviewing progress, analysing variance and initiating risk responses
 - confirming risks are assigned and monitored across the program at agreed intervals
 - assessing issues are for impact and remedial actions
- assess project and program risk-management outcomes, including:
 - identifying and documenting residual risk
 - reviewing and analysing program risk outcomes
 - documenting, analysing and recommending lessons learned
- respond to risk within complex programs that are subject to unpredictable contextual pressures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- the use of risk management tools, frameworks, systems, methodologies and standards

- the use of a dynamic risk register across a program.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry

This includes access to:

- workplace risk management documentation
- feedback from program stakeholders as to how risks were managed.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG633 Provide leadership for the program

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to provide leadership for the program. It covers leadership strategies to motivate and inspire individuals and organisations to work constructively toward attainment of program benefits through consolidating program vision, managing risks and supporting staff.

The unit applies to individuals who are program managers and those managing a suite of projects (a program). They operate within assigned authority levels, are responsible for their own performance and sometimes the performance of others.

Individuals in this role may be operating within an organisation, a business or as a consultant.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish program vision and environment | 1.1 Identify program vision, and organisation mission and values 1.2 Identify stakeholder objectives and expectations 1.3 Assist relevant stakeholders to develop and sustain the documented program vision 1.4 Consult with stakeholders and confirm program vision is in line with organisation mission and values |
| 2. Manage risks | 2.1 Identify and manage differences in views and expectations |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------|---|
| | 2.2 Attend to issues and concerns according to organisational policies and procedures 2.3 Identify and address threats to socially responsible practice within the program 2.4 Develop program socially responsible practice policies and procedures to guide team members to report breaches of socially responsible practice 2.5 Develop risk management plan and strategies |
| 3. Support staff learning | 3.1 Establish behavioural expectations for constituent project managers 3.2 Define, document and communicate with relevant stakeholders agreed roles and responsibilities 3.3 Communicate with relevant stakeholders, and identify and define learning needs and opportunities 3.4 Develop and maintain plans for identifying, capturing, disseminating and exchanging knowledge 3.5 Facilitate environment for reflection on and review of practices and activities 3.6 Coach relevant stakeholders to work toward attainment of program benefits |
| 4. Evaluate leadership | 4.1 Evaluate outcomes and identify opportunities for improvement 4.2 Seek feedback from relevant stakeholders on leadership skills and processes 4.3 Document feedback received and identify improvement needs and opportunities for future leadership |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|----------|--|
| Learning | <ul style="list-style-type: none"> Uses feedback to grow and develop own skills and experience and applies practical strategies to facilitate learning |
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Develops and updates roles and plans using language and structure to suit the audience Designs and develops documents according to organisational formats |
| Oral | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using clear and detailed |

| SKILL | DESCRIPTION |
|-------------------------|---|
| Communication | <ul style="list-style-type: none">language to provide relevant informationUses active listening and questioning techniques to confirm understanding |
| Self-management | <ul style="list-style-type: none">Contributes to the design of organisational policies and protocols that support goals of the organisationUnderstands responsibilities of own role and its contribution to broader goals of the work environment |
| Teamwork | <ul style="list-style-type: none">Selects and uses appropriate conventions and protocols when communicating with stakeholders to share informationEncourages a collaborative culture within own sphere of influence, investing time in building and maintaining effective working relationships and facilitating respect and commitment between stakeholders |
| Planning and organising | <ul style="list-style-type: none">Organises and implements tasks required to action knowledge management plansMakes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into accountIdentifies issues, and used problem-solving skills to evaluate options and decide on appropriate actions |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG617 Provide leadership for the program.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG633 Provide leadership for the program

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- provide leadership for a program of work.

In the course of above, the candidate must:

- choose and apply interpersonal and leadership styles according to situation
- treat stakeholders fairly and equitably
- embed confidence, trust, ethical and sustainable practices
- develop and support personnel within program environment
- treat errors, mistakes and expressed concerns as learning opportunities
- design knowledge management methods and processes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- behavioural models for the role of program manager
- program benefits
- strategies relevant to program management including
 - communication and negotiating styles and approaches
 - ethics, equity and fairness norms, regulations and legislation
 - learning and development methods and strategy
 - risk management plan and strategies
 - types and formats for program vision.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to program leadership
- feedback from stakeholders, which reflects how program leadership was implemented for a program.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG634 Facilitate stakeholder engagement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to facilitate stakeholder engagement in a program. It includes working with stakeholders through effective communication to achieve desired program benefits.

The unit applies to individuals who are program managers and those managing a suite of projects (a program). They operate within assigned authority levels, are responsible for their own performance, program outcomes, and sometimes the performance of others.

Individuals in this role may be operating within an organisation, a business or working as a consultant.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Communicate with stakeholders | 1.1 Identify and document program stakeholders and their communication needs as they apply to the given program of work 1.2 Engage with pertinent stakeholders and agree on communication approaches in accordance with organisational policies and procedures 1.3 Communicate information as planned and address identified variances |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 1.4 Monitor communication interfaces among constituent projects, and align to relevant program objectives |
| 2. Undertake stakeholder commitment | 2.1 Investigate and document interests and expectations of key stakeholders for making program decisions 2.2 Develop and implement approaches to influence ongoing stakeholder commitment according to organisational policies and procedures 2.3 Share evolving stakeholder interests and expectations across the program |
| 3. Assess effectiveness of stakeholder engagement | 3.1 Conduct analysis of interactions with key stakeholders and document outcomes to reach desired outcomes 3.2 Assess effectiveness of stakeholder interaction according to program objectives and organisational policies and procedures 3.3 Develop plan for future stakeholder engagement based on findings of analysis conducted |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Organises, evaluates and critiques ideas and information from complex texts |
| Writing | <ul style="list-style-type: none"> Develops a range of project related documents using appropriate format, vocabulary and structure |
| Oral Communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using language and features appropriate to audience Uses active listening and questioning techniques to confirm understanding |
| Teamwork | <ul style="list-style-type: none"> Identifies the importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how Builds and maintains effective working relationships within and beyond immediate work context Identifies, creates and utilises linkages to enhance knowledge sharing and commitment |
| Planning and organising | <ul style="list-style-type: none"> Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands |

| SKILL | DESCRIPTION |
|-------|--|
| | <ul style="list-style-type: none">Identifies issues and uses analytical techniques to generate and evaluate possible solutions and to make decisions |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG621 Facilitate stakeholder engagement.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG634 Facilitate stakeholder engagement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- facilitate stakeholder engagement on at least one occasion.

In the course of the above, the candidate must:

- provide examples of internal and external stakeholder communications, both formal and informal used in the workplace
- use different communication approaches in different stakeholder contexts
- conduct and document an introspective assessment of stakeholder effectiveness and develop a plan for future stakeholder interactions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- features of engagement models, benefits and applications
- forms and methods of stakeholder engagement
- features of several means, media and methods of communication
- features of various types and roles of program stakeholders
- features of relevant organisation policies and procedures
- program and organisational objectives.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- access to examples of program stakeholder engagement processes and interaction

- feedback from stakeholders, which reflects how stakeholder engagement was managed for a program.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG635 Implement program governance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish and implement governance requirements to ensure effective program management. It includes implementing systems and processes for decision-making, management systems, compliance and program support.

The unit applies to individuals who are program managers and those managing a suite of projects (a program). They operate within assigned authority levels, are responsible for their own performance and sometimes the performance of others.

Individuals in this role may be operating within an organisation, a business or working as a consultant.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Facilitate effective decision making and accountability | 1.1 Negotiate and communicate clear roles and responsibilities to all relevant stakeholders 1.2 Confirm decision making roles with stakeholders 1.3 Document decisions and accountabilities for program objectives 1.4 Make decisions regarding complex priorities and competing demands using repeatable methods |
| 2. Implement systems | 2.1 Establish systems and processes according to program |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|--|
| and methods | objectives 2.2 Implement management control systems for monitoring program progress against organisational objectives 2.3 Generate audit documentation, presenting information and distributing reports to key stakeholders 2.4 Establish and monitor process efficiency 2.5 Support process with relevant program policy |
| 3. Ensure program compliance | 3.1 Identify both organisation and external compliance requirements relevant to the program 3.2 Establish and securely maintain audit records according to legislative requirements 3.3 Report on compliance to relevant authorities and key stakeholders 3.4 Identify and implement actions to rectify non-compliant behaviours, processes and products |
| 4. Enable program support services | 4.1 Identify management and internal personnel support needs for the program 4.2 Evaluate and establish appropriate systems for supporting implementation 4.3 Establish skill development support systems for program personnel to meet program needs 4.4 Implement program support protocols within an organisation according to organisational policies |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from a range of sources |
| Writing | <ul style="list-style-type: none"> Prepares and modifies agreements and plans using appropriate language and format |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using language and features appropriate to the audience Uses active listening and questioning techniques to confirm understanding |
| Teamwork | <ul style="list-style-type: none"> Uses interpersonal skills to negotiate agreements with diverse stakeholders |

| SKILL | DESCRIPTION |
|-------------------------|---|
| | <ul style="list-style-type: none">• Invests time and energy in building and maintaining effective working relationships |
| Planning and organising | <ul style="list-style-type: none">• Plans, implements and monitors systems and activities required to implement program governance• Analyses and evaluates options to make decisions about possible governance issues• Evaluates outcomes to identify improvement opportunities |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG622 Implement program governance.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG635 Implement program governance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement program governance on at least one occasion.

In the course of the above, the candidate must:

- compare decision making processes and outcomes against program objectives
- identify alternative program management systems
- design a program records and configuration system
- compare types of effective program policy
- identify ways to support program implementation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- techniques for the use and purpose of program controls
- functions of audit and/or compliance requirements for a program
- plans to rectify program compliance problems
- decision making processes in the program context
- methods to support skill development support within a program.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to program governance

- feedback from stakeholders, which reflects how program governance was implemented for a program.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG636 Manage benefits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage the attainment of program benefits. It includes ensuring that benefits are identified and realised when and as expected.

The unit applies to individuals who are program managers and those managing a suite of projects (a program). They operate within assigned authority levels, are responsible for their own performance and sometimes the performance of others.

Individuals in this role may be operating within an organisation, a business or working as a consultant.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify benefits and trade-offs | 1.1 Analyse benefits and their alignment to organisational objectives 1.2 Define and communicate expected short- and long-term benefits and trade-offs with key stakeholders 1.3 Assess project and program performance against respective plans 1.4 Monitor and evaluate internal and external program contexts for circumstances that may require changes to the expected benefits |
| 2. Execute to deliver | 2.1 Define and confirm benefit dependencies with key stakeholders |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| expected benefits | 2.2 Devise and agree benefits delivery approach with key stakeholders considering impact of the benefit on risk management, issues management, and change control 2.3 Assign ownership of benefits delivery 2.4 Review confirm and update benefits measurement approach and benefits delivery approach |
| 3. Sustain and evaluate attainment of expected benefits | 3.1 Assess deliverables from constituent projects according to benefits measurement approach 3.2 Measure and report progress toward delivery of expected benefits with key stakeholders 3.3 Evaluate and communicate benefits against established projects delivery plan 3.4 Assess and record lessons learned throughout projects and communicate to pertinent stakeholders 3.5 Address variances in delivery of expected benefits |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Prepares documentation to confirm and report on defined benefits and reviews using appropriate format, vocabulary and structure |
| Oral Communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using language and features appropriate to audience Uses active listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Calculates, compares and contrasts outcomes against targets using appropriate mathematical formulae |
| Planning and organising | <ul style="list-style-type: none"> Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands Sequences and schedules complex activities, monitors implementation and evaluates results |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG623 Manage benefits.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG636 Manage benefits

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage benefits for a program of work.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- components of different benefit delivery models
- qualitative and quantitative data to assess project and program performance against plans
- techniques used in decision making theory and analysis applied to benefits assessment
- types and definition of program benefits
- workplace identification and documentation of program benefits
- relationship between program delivery and benefits realisation approaches
- forecasting program benefits realisation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- access to examples of program workplace documentation related to attaining program benefits
- feedback from stakeholders, which reflects how benefits management was managed for a program.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG637 Engage in collaborative alliances

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to enable a program manager to engage in collaborative alliances. It includes identifying opportunities and forging alliances with other organisations to facilitate attainment of program benefits.

Collaborative alliances are significantly different in focus and content from commercial contracts in that the parties operate as partners with shared interests and a higher degree of joint decision-making. Collaborative agreements often involve organisations that are part of the same legal entity such as business units of the same corporation or departments of the same government.

The unit applies to individuals who are program managers and those managing a suite of projects (a program). They operate within assigned authority levels, are responsible for their own performance, program outcomes, and sometimes the performance of others.

Individuals in this role may be operating within an organisation, a business or as a consultant.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify opportunities for collaboration and develop collaborative alliances | 1.1 Identify and evaluate opportunities for collaborative alliances according to organisational and program objectives 1.2 Identify and evaluate potential collaborators according to organisational policies |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 1.3 Initiate and develop relationships with potential collaborators according to organisational policies and procedures |
| 2. Establish collaborative agreements | 2.1 Initiate, negotiate, agree and document a collaborative approach with parties which adhere to organisational policies and relevant legal requirements 2.2 Approve and review each formal agreement to ensure continuation of envisaged value and to identify potential need for changes and additions according to organisational policies and procedures 2.3 Develop collaboration plans for each agreement to support implementation |
| 3. Support the evolution of collaborative agreements | 3.1 Monitor and nurture relationships with collaborators 3.2 Assess performance of all parties to an agreement against organisational and program objectives and expected results, and address variances 3.3 Make changes to agreements as required according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from a range of sources |
| Writing | <ul style="list-style-type: none"> Prepares and modifies agreements and plans using appropriate language and format |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using language and features appropriate to the audience Uses active listening and questioning techniques to confirm understanding |
| Teamwork | <ul style="list-style-type: none"> Uses interpersonal skills to negotiate agreements with diverse stakeholders Invests time and energy in building and maintaining effective working relationships |
| Planning and organising | <ul style="list-style-type: none"> Plans, implements and monitors tasks and activities required to achieve collaborative alliance goals Evaluates outcomes to identify improvement opportunities |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG624 Engage in collaborative alliances.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG637 Engage in collaborative alliances

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- engage in collaborative alliances on at least one occasion.

In the course of the above, the candidate must:

- employ environment scanning techniques to identify opportunities for collaboration that are aligned to desired program outcomes
- review of formal agreements
- assess effectiveness of collaborative relationships.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- methods to identify and evaluate potential collaborators
- features of methods to maintain and sustain alliances
- negotiating strategies
- types of collaboration agreements
- features of relevant organisational policies and procedures
- program and organisational objectives
- strategies to review collaborative agreements in relation to program objectives.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- access to workplace documentation regarding collaborative alliances

- feedback from stakeholders, which reflects how collaborative alliances were managed for a program.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG810 Prioritise projects and programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prioritise projects and programs within a portfolio. It covers the identification, strategic alignment and setting of priorities at the portfolio level.

A portfolio is the centralised management of one or more portfolios of projects, which includes identifying, prioritising, authorising, managing and controlling projects, programs and other related work, to achieve specific strategic business objectives.

The unit applies to individuals who operate at the strategic level within the organisation. Unlike projects or programs, a portfolio does not have a finite life, instead it is a continuous process and requires regular tending to ensure the portfolio remains in balance and is consistent with the strategic objectives of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify projects and programs | 1.1 Identify proposed, planned, active or inactive projects and programs in the organisation 1.2 Identify project sponsor and project approval status of all identified projects 1.3 Capture macro-level project and program information for every project and program within the project portfolio |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|--|
| | 1.4 Implement ongoing identification and capture of project and program information |
| 2. Undertake strategic alignment | 2.1 Align and objectively score projects and programs against organisational strategic objectives 2.2 Identify and assess key drivers, internal and external sources of impact for projects and programs within the portfolio 2.3 Assess projects and programs for alignment with strategic objectives 2.4 Highlight and flag projects and programs that do not align to one or more strategic objective for further analysis 2.5 Categorise projects and programs according to each strategic objective |
| 3. Apply prioritisation | 3.1 Identify, document and review organisational prioritisation methods 3.2 Agree on prioritisation criteria for project portfolio assessment with executive stakeholders 3.3 Prioritise projects and programs based on their alignment |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Develops and documents analysis of project prioritisation using appropriate organisational formats and project management vocabulary |
| Oral Communication | <ul style="list-style-type: none"> Participates in discussions using language and features appropriate to the audience Uses active listening and questioning techniques to confirm understanding |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies how own role contributes to the broader goals of the organisation, and uses this to inform planning |
| Teamwork | <ul style="list-style-type: none"> Plays a lead role in situations requiring effective collaboration and high-level negotiation skills |
| Planning and organising | <ul style="list-style-type: none"> Sequences and schedules complex activities with an understanding of how they contribute to broader organisational goals Systematically gathers and analyses all relevant information and |

| SKILL | DESCRIPTION |
|-------|---|
| | evaluates options to inform decisions about strategic alignment |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG801 Prioritise projects and programs.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG810 Prioritise projects and programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- for at least one portfolio of work, identify programs, undertake strategic alignment of projects to organisational objectives, and prioritise projects.

In the course of the above, the candidate must:

- develop a program and project register
- negotiate and document minutes of meetings demonstrating agreement to portfolio evaluation criteria
- prepare a portfolio charter
- apply the organisational prioritisation model for projects and programs
- map and provide solutions for dependency between projects and programs.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- formalised tools and processes to capture and collate information
- project and program priorities and categories
- level of detail captured on each project and program and methods to record and manage
- steps in an organisational prioritisation method
- review and decision-making processes used to determine the alignment of projects and programs to various strategic themes
- examples of how internal and external environmental factors are considered in projects and programs.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- feedback from stakeholders, which reflects how prioritisation was managed for a portfolio.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG811 Select and balance the portfolio

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to select and balance a portfolio. It covers the screening of projects and programs, undertaking investment appraisal, selecting and gaining approval and monitoring a portfolio.

A portfolio is the centralised management of one or more portfolios of projects, which includes identifying, prioritising, authorising, managing and controlling projects, programs and other related work, to achieve specific strategic business objectives.

The unit applies to individuals who operate at the strategic level within the organisation. Unlike projects or programs, a portfolio does not have a finite life, instead it is a continuous process and requires regular tending to ensure the portfolio remains in balance and is consistent with the organisation's strategic objectives.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Undertake screening | 1.1 Review business case for each project and program according to task requirements to capture interfaces, emergent risks, resource requirements, business benefits and their timings 1.2 Identify business benefits to be achieved by mapping dependencies between projects and programs 1.3 Identify and add mandatory projects and programs to the project |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | portfolio |
| 2. Complete investment appraisal | 2.1 Identify desirability of project and programs based on their risk, projected benefits and business impacts assessment 2.2 Examine and adjust projects and programs that deliver similar business benefits and outcomes 2.3 Commission feasibility studies in instances where additional analysis is required to determine investment merit 2.4 Identify most appropriate projects and programs to receive organisational investment using a comparative analysis 2.5 Determine the budget or financial profile for each project and program |
| 3. Select projects and programs for the portfolio | 3.1 Use a project selection model to select projects and programs that comprise the portfolio 3.2 Review the organisations ideal project and program mix and calibrate the project selection model 3.3 Select projects and programs for inclusion in the portfolio based on the project selection model used by the organisation 3.4 Solicit project selection decision-making and support from executive management by preparing and presenting information |
| 4. Monitor and apply approval status | 4.1 Review and update the project and program approval process 4.2 Make recommendations to executive management for projects to be included in the portfolio 4.3 Facilitate the approval of projects or programs to be included in the portfolio by executive management 4.4 Allocate projects and programs a selection status 4.5 Provide identified funding and resources to approved projects and programs |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Documents results of screening and selection processes Develops documents to communicate results of selection process using appropriate formats and vocabulary |

| SKILL | DESCRIPTION |
|-------------------------|--|
| Oral Communication | <ul style="list-style-type: none">• Presents information using language and features appropriate to the audience• Uses active listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none">• Interprets numerical data to determine resource requirements, budgetary needs and funding possibilities• Uses analytical processes to evaluate information and decide on most appropriate options |
| Self-management | <ul style="list-style-type: none">• Understands the relationship between immediate tasks and the broader goals of the organisation, and uses this to inform decision-making |
| Teamwork | <ul style="list-style-type: none">• Plays a lead role in situations requiring effective collaboration and high-level influencing and negotiation skills |
| Planning and organising | <ul style="list-style-type: none">• Develops and implements flexible plans for complex, high impact activities with organisational implications• Sequences and schedules activities to achieve planned outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG802 Select and balance the portfolio.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG811 Select and balance the portfolio

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- select and balance the portfolio on at least one occasion.

In the course of the above, the candidate must:

- prepare a dependency map
- undertake a project selection process
- prepare a detailed project register for a portfolio explaining selection, appraisal and approval monitoring
- monitor and control the status of project and program approvals.
- demonstrate use of analysis methods and techniques, including:
 - cost-benefit analysis
 - quantitative analysis
 - scenario planning
 - probability analysis
 - graphical analysis methods.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- business cases review process
- rejected, cancelled or on-hold projects and programs with reasons for rejection
- key analysis methods and techniques
- process to cancel or put on hold those projects and programs currently underway that have been rejected from the portfolio
- list of approved and rejected projects and programs to stakeholders
- criterion prioritisation models

- supply and demand concepts
- methods to determine organisational human resources capacity
- structure and use of business cases and feasibility studies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources
- feedback from stakeholders, which reflects how selection and balance across the portfolio was achieved.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG812 Manage and review portfolio performance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to effectively manage and review a portfolio. It covers project and program oversight, continuous improvement across the portfolio and benefits management realisation.

A portfolio is the centralised management of one or more portfolios of projects, which includes identifying, prioritising, authorising, managing and controlling projects, programs and other related work, to achieve specific strategic business objectives.

The unit applies to individuals who operate at the strategic level within the organisation. Unlike projects or programs, a portfolio does not have a finite life, instead it is a continuous process and requires regular tending to ensure the portfolio remains in balance and is consistent with the organisation's strategic objectives.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Program and project delivery oversight | 1.1 Align the portfolio review cycle with appropriate project or program review points 1.2 Review project and program performance against respective plans and measure performance against continuously captured qualitative and quantitative data 1.3 Monitor the portfolio against projects or programs key |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | objectives and benefits 1.4 Flag projects and programs not achieving planned performance for review and further investigation 1.5 Make recommendations to change projects or programs included in the portfolio |
| 2. Portfolio continuous improvement | 2.1 Review and improve project identification and approval 2.2 Assess portfolio value and contribution to strategic priorities through the monitoring and review of key performance indicator measures 2.3 Apply lessons learned into the project selection, prioritisation and portfolio balancing processes |
| 3. Benefits management and realisation | 3.1 Prepare and update portfolio delivery map showing the key timings and inter-dependencies between projects and programs and the associated benefits to be produced 3.2 Manage the portfolio according to organisational objectives |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Documents results of reviews using appropriate organisational formats Prepares documents to support portfolio management using format and vocabulary suitable to audience |
| Oral Communication | <ul style="list-style-type: none"> Provides information using language and features appropriate to audience |
| Numeracy | <ul style="list-style-type: none"> Interprets quantifiable data to effectively manage and review portfolios |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies the relationship between immediate tasks and organisational strategic objectives, and uses this to inform assessments |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate communication methods and practices to provide recommendations |
| Planning and organising | <ul style="list-style-type: none"> Develops flexible plans for complex, high impact activities with strategic implications, making changes when required Monitors and analyses performance against plans to identify and implement improvements |

| SKILL | DESCRIPTION |
|-------|---|
| | <ul style="list-style-type: none">Evaluates outcomes to identify process improvements |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG803 Manage and review portfolio performance.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG812 Manage and review portfolio performance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage and review portfolio performance on at least one occasion.

In the course of the above, the candidate must:

- identify how the portfolio can be continuously improved
- apply types of qualitative and quantitative data and other metrics that can be used to determine project performance
- determine and map cross project/program dependencies
- respond to signs and symptoms of project/program failure and underperformance.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- portfolio review matrix, including the collection of qualitative and quantitative data and other metrics
- cross project or program dependency map
- use of the portfolio review document
- project or program performance report or audit
- use of the portfolio delivery map.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence

- feedback from stakeholders, which reflects on how portfolio performance was reviewed.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG813 Govern the portfolio

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to provide governance over a portfolio. It covers applying standards, governance models and the portfolio charter.

A portfolio is the centralised management of one or more portfolios of projects, which includes identifying, prioritising, authorising, managing and controlling projects, programs and other related work, to achieve specific strategic business objectives.

The unit applies to individuals who operate at the strategic level within the organisation. Unlike projects or programs, a portfolio does not have a finite life, instead it is a continuous process and requires regular tending to ensure the portfolio remains in balance and is consistent with the strategic objectives of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to govern | 1.1 Develop disciplined governance arrangements for projects and programs within the portfolio 1.2 Develop business strategy according to project portfolio 1.3 Verify that all projects and programs within the portfolio have an approved plan prepared to organisational and legislative requirements 1.4 Verify decision-making competence of members of delegated |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|---|
| | <p>authorisation bodies</p> <p>1.5 Define criteria for reporting project status and for the escalation of risks and issues to the levels required by the organisation</p> |
| 2. Undertake governance activities | <p>2.1 Prepare a portfolio charter, which clearly establishes portfolio governance and management roles, authorities, approval limits, responsibilities and the scope of portfolio control</p> <p>2.2 Apply disciplined governance arrangements, supported by appropriate methods and controls, to projects and programs within the portfolio</p> <p>2.3 Implement business strategy</p> <p>2.4 Record and communicate decisions made at authorisation points</p> <p>2.5 Support executive management to ensure appropriate independent assurance of projects/programs occurs</p> |
| 3. Monitor governance processes | <p>3.1 Communicate required portfolio updates with portfolio stakeholders according to task and organisational requirements</p> <p>3.2 Review the portfolio charter</p> <p>3.3 Evaluate project performance against criteria for reporting project status</p> <p>3.4 Identify areas for improvement</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-----------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Develops governance documentation using organisational formats and vocabulary suitable for the audience Records results of decisions using format and vocabulary suitable for the audience |
| Self-management | <ul style="list-style-type: none"> Identifies and adheres to organisational, legal and regulatory requirements |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate communication methods and practices to provide recommendations |

| SKILL | DESCRIPTION |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Develops flexible plans to manage complex, high impact activities with strategic implications• Regularly reviews outcomes against requirements to determine the need for change |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG804 Govern the portfolio.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG813 Govern the portfolio

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- establish governance over a portfolio on at least one occasion.

In the course of the above, the candidate must:

- prepare a portfolio charter
- apply a decision-making matrix with suitable criteria
- determine a suitable governance model to a portfolio context
- define suitable decision-making authorities and delegations
- prepare governance documentation and reports.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- governance mechanisms established in the portfolio
- project, program and corporate governance models
- appropriate methods and controls, for supporting disciplined governance arrangements
- methods to incorporate legislative, regulatory or business requirements and changes into portfolio management decisions and controls
- content and requirements of approved plans
- features of efficient delegated authorisation body decision-making including:
 - sufficient representation
 - competence
 - authority
 - resources to enable bodies to make appropriate decisions
- link between portfolio governance mechanisms and those used in projects/programs
- suitable methods to communicate the governance requirements to subordinates
- how portfolio decisions are made and supported.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- feedback from stakeholders, which reflects how governance was managed within a portfolio.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG814 Lead the portfolio

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead the portfolio. It covers provision of effective leadership and management within the portfolio, and ensuring a vision is developed and communicated.

A portfolio is the centralised management of one or more portfolios of projects, which includes identifying, prioritising, authorising, managing and controlling projects, programs and other related work, to achieve specific strategic business objectives.

The unit applies to individuals who operate at the strategic level within the organisation. Unlike projects or programs, a portfolio does not have a finite life, instead it is a continuous process and requires regular tending to ensure the portfolio remains in balance and is consistent with the strategic objectives of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Lead the portfolio team | 1.1 Champion portfolio management within the organisation 1.2 Justify portfolio management resourcing at prescribed intervals according to task requirements 1.3 Quantify and communicate the associated value provided to the business 1.4 Brief and support project and program sponsors throughout the |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------|--|
| | <p>project/program lifecycles according to task requirements</p> <p>1.5 Assess performance of portfolio management staff and provide feedback according to task requirements</p> <p>1.6 Communicate and negotiate with internal and external stakeholders according to task requirements</p> |
| 2. Make strategic decisions | <p>2.1 Establish a portfolio vision</p> <p>2.2 Communicate the portfolio vision to stakeholders according to organisational requirements</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Prepares documents to support portfolio management resourcing using organisational formats and project specific vocabulary Documents results of performance reviews using appropriate organisational formats |
| Oral Communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using language and features appropriate to audience Uses active listening and questioning techniques to confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Identifies quantifiable data to effectively justify financial benefits to business |
| Self-management | <ul style="list-style-type: none"> Identifies and adheres to organisational requirements and contributes to the broader goals of the organisation |
| Teamwork | <ul style="list-style-type: none"> Selects and uses communication methods and practices appropriate to audience and context Builds and maintains effective relationships within immediate work context |
| Planning and organising | <ul style="list-style-type: none"> Devises and implements plans to champion portfolio management Reviews implementation activities at regular intervals to decide on further actions |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG805 Lead the portfolio.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG814 Lead the portfolio

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead at least one portfolio of work.

In the course of the above, the candidate must:

- provide management support and direction to the portfolio team
- act as a role model and portfolio champion within the organisation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- the application of team management techniques and strategies
- performance management within a team
- how a portfolio manager can champion the vision within an organisation
- content and development of a portfolio vision including:
 - strategic plan
 - vision statement
 - charter
 - business plan
- motivation and leadership theories.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- feedback from stakeholders, which reflects how the portfolio was led.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG815 Manage portfolio communications and change

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage communications and change within a portfolio. It covers portfolio metrics, data collection and measurement, stakeholder involvement and communication.

A portfolio is the centralised management of one or more portfolios of projects, which includes identifying, prioritising, authorising, managing and controlling projects, programs and other related work, to achieve specific strategic business objectives.

The unit applies to individuals who operate at the strategic level within the organisation. Unlike projects or programs, a portfolio does not have a finite life, instead it is a continuous process and requires regular tending to ensure the portfolio remains in balance and is consistent with the strategic objectives of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Apply portfolio metrics, measurement and report | 1.1 Develop and review a portfolio communications strategy, for use by portfolio staff 1.2 Capture and manage information on projects and programs that comprise the portfolio and their status using a portfolio management information system 1.3 Verify progress reports to executive management show |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | <p>achievement or non-achievement toward strategic objectives</p> <p>1.4 Communicate project selection criteria and project selection model throughout the organisation</p> <p>1.5 Integrate portfolio data collection processes and systems into organisational processes and systems</p> |
| 2. Undertake stakeholder engagement and management | <p>2.1 Develop and implement process for organisational strategic management planning team to interact with executive management</p> <p>2.2 Consider internal and external stakeholder needs in portfolio mix</p> <p>2.3 Verify the organisation fosters a culture of continuous improvement and of open internal disclosure of appropriate portfolio information</p> |
| 3. Communicate portfolio review outcomes | <p>3.1 Identify and communicate criteria to evaluate portfolio management success</p> <p>3.2 Forward portfolio management reports containing strategic information of portfolio status and progress to key project stakeholders according to task requirements</p> <p>3.3 Communicate projects selected for inclusion in and rejection from the portfolio along with the rationale for the decision</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Develops strategies and supporting documentation using appropriate organisational formats and vocabulary Drafts and develops written communications to stakeholders using structure and vocabulary appropriate to the audience |
| Oral Communication | <ul style="list-style-type: none"> Provides information using language and features appropriate to audience Uses active listening and questioning techniques to confirm understanding |
| Self-management | <ul style="list-style-type: none"> Identifies contribution of own activities to the achievement of strategic objectives |

| SKILL | DESCRIPTION |
|-------------------------|--|
| Teamwork | <ul style="list-style-type: none">• Selects and uses appropriate communication methods and practices to provide information to a range of stakeholders |
| Planning and organising | <ul style="list-style-type: none">• Plans and implements complex tasks to achieve strategic objectives• Analyses available information to decide on actions needed to facilitate stakeholder engagement• Uses digital tools to access, organise and analyse information for strategic purposes |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG806 Manage portfolio communications and change.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG815 Manage portfolio communications and change

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage portfolio communications and change on at least one occasion.

In the course of the above, the candidate must:

- undertake executive briefings and presentations on the portfolio management approach
- prepare and deliver executive briefings on the portfolio status
- prepare portfolio reports showing component project/program performance
- document minutes of portfolio review meetings
- provide advice explaining why projects have been included or excluded from the portfolio.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- examples of project, program and business level reporting
- influence of organisational politics on portfolio performance
- importance of negotiation and influencing skills
- principles of change management as applied to a portfolio.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence

- feedback from stakeholders, which reflects how communication and change was managed within a portfolio.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG816 Manage portfolio resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage human resources within a portfolio. It covers capacity planning, capacity assessment, assignment and coordination of human resources for a portfolio.

A portfolio is the centralised management of one or more portfolios of projects, which includes identifying, prioritising, authorising, managing and controlling projects, programs and other related work, to achieve specific strategic business objectives.

The unit applies to individuals who operate at the strategic level within the organisation. Unlike projects or programs, a portfolio does not have a finite life, instead it is a continuous process and requires regular tending to ensure the portfolio remains in balance and is consistent with the strategic objectives of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assess portfolio resources capacity | 1.1 Identify project and program resources based on resource forecasts 1.2 Capture a baseline of existing and proposed resources 1.3 Review, identify and assess the resource capacity of the organisation according to task requirements 1.4 Develop, review and update a portfolio resource strategy based |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | on the status of projects and programs in the portfolio |
| 2. Assess skills and experience | 2.1 Capture and maintain details of human resource skill sets and experience 2.2 Capture and maintain human resource availability and utilisation information 2.3 Highlight human resource deficiencies and strengths and factor these into the organisational workforce and development plans 2.4 Implement strategies to resolve human resource deficiencies and imbalances 2.5 Assess readiness for change and identify impacts of change |
| 3. Assign project and program resources | 3.1 Allocate resources optimally based on organisational strategic priority of projects and programs within the portfolio 3.2 Forecast the impact on the organisation of project and program resource allocation and utilisation against plans 3.3 Identify and investigate resource gaps and conflicts 3.4 Take appropriate action to resolve the identified resource constraints according to organisational strategic priorities |
| 4. Coordinate and prioritise resources | 4.1 Coordinate cross-organisational resource assignment to support prioritised projects and programs 4.2 Reallocate resources from projects/programs cancelled or put on hold |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning |
| Numeracy | <ul style="list-style-type: none"> Identifies numerical information to determine resource requirements, assignments and reallocations |
| Self-management | <ul style="list-style-type: none"> Identifies the relationship of own activities to organisational strategic goals |
| Planning and organising | <ul style="list-style-type: none"> Develops and implements flexible plans for complex, high impact activities with strategic implications Prioritises and schedules complex activities, monitors implementation and makes changes to plans where required |

| SKILL | DESCRIPTION |
|-------|--|
| | <ul style="list-style-type: none">• Uses problem-solving processes to identify and analyse program resource issues, and decide on appropriate response |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG807 Manage portfolio resources.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG816 Manage portfolio resources

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage portfolio resources on at least one occasion.

In the course of the above, the candidate must:

- undertake skills assessment and identify solutions
- optimise human resource allocation across projects and programs
- prepare resource utilisation calculations from collection techniques.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- human resource allocation models
- strategic human resource management approaches
- factors for consideration in a review and a portfolio strategy update, including considering the organisations resource constraints
- requirements to coordinate cross-organisational resource assignment including:
 - risk requirements
 - quality requirements
- calculation and distribution based on supply and demand concepts
- workforce planning methods
- the application of strategic resource management and planning.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- feedback from stakeholders, which reflects how human resources were managed within the portfolio.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPMG817 Manage portfolio risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage the risks within a portfolio. It covers the identification, analysis, monitoring and control of portfolio risks.

A portfolio is the centralised management of one or more portfolios of projects, which includes identifying, prioritising, authorising, managing and controlling projects, programs and other related work, to achieve specific strategic business objectives.

The unit applies to individuals who operate at the strategic level within the organisation. Unlike projects or programs, a portfolio does not have a finite life, instead it is a continuous process and requires regular tending to ensure the portfolio remains in balance and is consistent with the strategic objectives of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Project Management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish portfolio risks | 1.1 Establish and review standards and procedures for portfolio risk management according to task requirements 1.2 Integrate the portfolio risk management approach with organisational risk management systems and strategies 1.3 Analyse organisational risk appetite 1.4 Seek input about risks from stakeholders, executive management and other specialists |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 1.5 Identify external and internal threats and opportunities and assess their impact on the portfolio |
| 2. Analyse portfolio risks | 2.1 Calculate overall portfolio risk profile and organisational exposure using results from project and program risks analysis 2.2 Capture and review individual project and program risks on a regular basis to determine the potential impact on the organisation 2.3 Audit project and program risks to monitor risk management performance and assess the portfolio risk profile |
| 3. Monitor and control portfolio risks | 3.1 Implement and manage organisational risk reserves 3.2 Explore opportunities identified through risk analysis 3.3 Implement strategies to minimise impact of portfolio risks to organisation |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Applies appropriate strategies to construct meaning from complex texts |
| Writing | <ul style="list-style-type: none"> Demonstrates sophisticated writing skills by selecting appropriate conventions and stylistic devices to express precise meaning |
| Oral Communication | <ul style="list-style-type: none"> Participates in a range of verbal exchanges using language and features appropriate to audience Uses active listening and questioning techniques to confirm understanding |
| Self-management | <ul style="list-style-type: none"> Contributes to the development and review of procedures to align with organisational goals and values |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate communication methods and practices to seek information from a range of stakeholders |
| Planning and organising | <ul style="list-style-type: none"> Develops flexible plans for complex, high impact activities with strategic implications with specific focus on risk assessment and management Prioritises and schedules complex activities, monitors implementation and makes changes to plans where required Systematically analyses and assesses available information to decide on actions needed to manage portfolio risk Stores results from risk analysis to enable future access |

| SKILL | DESCRIPTION |
|-------|---|
| | <ul style="list-style-type: none">Identifies opportunities for new ideas or approaches based on risk analysis |

Unit Mapping Information

Supersedes and is equivalent to BSBPMG808 Manage portfolio risk.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPMG817 Manage portfolio risk

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage portfolio risk on at least one occasion.

In the course of the above, the candidate must:

- apply lessons learned from previous project/programs in portfolio planning
- analyse risks and opportunities
- communicate risk events, responses and results to stakeholders
- develop risk management plans
- detail the conduct of risk reappraisal
- review the effectiveness of risk management processes, procedures, tools and recommendations
- document improvements and risk management lessons learned.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- risk management theory
- potential risk events
- Australian and international risk management standards
- the use of qualitative and quantitative risk techniques, including:
 - cause and effect modelling
 - risk probability and impact assessment
 - probability and impact matrix
 - risk data quality assessment
 - risk categorisation
 - risk urgency assessment
- enterprise risk management approaches.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- feedback from stakeholders, which reflects how risk was managed for a portfolio.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC401 Plan procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to identify suppliers, determine procurement methods, establish a plan and prepare for procurement activities.

It applies to individuals who are required to plan for complex procurement activities through the identification of materials and services to support organisation strategies.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish goods and services to be procured | 1.1 Determine and agree organisation need for goods and/ or services to be procured 1.2 Obtain specifications for goods and services to be procured from relevant personnel and clarify as required 1.3 Research and identify supply market for goods and/ or services to be procured 1.4 Select procurement methods most appropriate to particular goods and services to be procured |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 1.5 Communicate with stakeholders to approve goods and/or services to be procured |
| 2. Evaluate specifications of procurement | 2.1 Assess the scope and function of goods and/or services to be procured, identifying outcomes, objectives and logistics 2.2 Establish procurement timeframe and develop a schedule for tender of goods and/or services 2.3 Create measurable outputs for desired contractual outcomes 2.4 Specify resource requirements and stakeholders responsible for key procurement activities |
| 3. Identify suppliers | 3.1 Conduct market analysis to identify suppliers 3.2 Develop request for quotation documentation and invite suppliers to bid 3.3 Review suppliers against procurement requirements and organisational protocols 3.4 Make recommendations about preferred offers, seek and obtain approval from relevant personnel |
| 4. Manage procurement plan | 4.1 Establish a strategy for managing the outputs from the supplier 4.2 Develop key performance indicators to monitor performance and ensure outcomes are achieved 4.3 Create a management strategy for transition in/out issues 4.4 Consult with stakeholders to confirm procurement plan 4.5 Consult with stakeholders through all stages of the development of the procurement plan |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none"> Analyses and interprets information to identify relevant key information |
| Writing | <ul style="list-style-type: none"> Creates everyday workplace documentation using terminology and format relevant to audience and |

| | |
|----------------------------|---|
| | purpose |
| Oral Communication | <ul style="list-style-type: none"> • Uses suitable language to liaise with suppliers and clarify information within the organisation • Uses active questioning and listening techniques to confirm requirements |
| Numeracy | <ul style="list-style-type: none"> • Performs mathematical analysis to evaluate supplier bids |
| Navigate the world of work | <ul style="list-style-type: none"> • Follows organisational procedures and policies • Understands how own role connects with others and contributes to broader work goals |
| Get the work done | <ul style="list-style-type: none"> • Takes responsibility for planning, sequencing and prioritising tasks for efficient and effective outcomes • Implements standard procedures to make routine decisions • Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBPRC401 Plan procurement Release 1 | BSBPUR401 Plan purchasing Release 1 | Title change, updates to elements, performance criteria and assessment requirements | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC401 Plan procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- establish goods and/ or services to be procured and prepare request for quotation
- create procurement methods and verify with stakeholders
- assess the scope of the procurement and create a schedule
- determine desired organisational outcomes from procurement activity
- evaluate resource requirements for all procurement activities
- analyse market for goods and/ or services to be procured
- identify and issue invitation for suppliers to offer
- prepare offers and obtain offer approval from stakeholders
- develop strategies to manage supplier transition and performance
- consult with stakeholders throughout the duration of procurement planning activities.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key principles and practices of planning procurement activities for goods and/or services
- key features of organisational policies and procedures relating to planning procurement for goods and/ or services, including:
 - organisational policy and procedures for preparing and evaluating supplier offers
 - organisational stakeholder buy-in and continual consultation for procurement activities
 - alignment to organisational strategic goals
 - safety procedures for specific procurement activities

- key features of routine procurement plans.
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – procurement and contracting field of work and include access to:

- organisation policies and procedure
- procurement strategies and relevant procurement records
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC402 Negotiate contracts

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to participate in the negotiation of contracts to procure goods and/or services.

It applies to individuals who undertake activities such as cost and market analysis, using information to support the planning of negotiations with suppliers to achieve best value. Individuals are required to plan, prepare and undertake effective contract negotiations while demonstrating high levels of personal effectiveness.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for contract negotiation with suppliers | 1.1 Prepare for contract negotiation and research supplier organisation information, regulatory constraints and unique category considerations 1.2 Undertake market analysis to support contract negotiations and inform negotiation strategy 1.3 Seek legal advice on implications for procurement of goods and/ or services that may impact contract negotiations 1.4 Identify risks associated with contract negotiations |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|--|
| 2. Establish negotiation processes | <p>2.1 Determine the objectives and establish strategies for contract negotiation meeting</p> <p>2.2 Establish resourcing requirements with organisation stakeholders</p> <p>2.3 Access legal expertise to determine the legal requirements for the organisation and ensure they are compliant</p> <p>2.4 Recognise the use and the content of contractual terms for procured goods and/ or services</p> |
| 3. Undertake contract negotiation | <p>3.1 Establish the bargaining position with stakeholders to determine strength and weaknesses of organisational procurement capability</p> <p>3.2 Define and evaluate the attributes of a good negotiator and apply them to effective negotiations</p> <p>3.3 Employ a range of persuasive techniques and tactics to navigate difficult circumstances and achieve desired contract outcome</p> <p>3.4 Use verbal and non-verbal communications in negotiation situations including reducing the potential for conflict</p> |
| 4. Finalise contracts | <p>3.1 Ensure contracts are signed and exchanged between the organisation and suppliers</p> <p>3.2 Develop and discuss the legalities and commercial considerations linked to the contract in accordance with organisational requirements</p> <p>3.3 Ensure contracts and related documents are stored and safeguarded</p> <p>3.4 Advise relevant stakeholders of contract requirements</p> <p>3.5 Advise unsuccessful suppliers of non-acceptance of offers</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|--|
| Reading | <ul style="list-style-type: none">Interprets and analyses textual information from a range of sources and identifies relevant key information to assist in the negotiation process |

| | |
|----------------------------|--|
| Writing | <ul style="list-style-type: none"> Develops material to convey explicit information and results using clear and detailed language appropriate to audience and context |
| Oral Communication | <ul style="list-style-type: none"> Uses clear language and suitable features to provide information to a variety of individuals Uses active listening and questioning techniques to convey and clarify information |
| Navigate the world of work | <ul style="list-style-type: none"> Monitors adherence to implicit and explicit organisational procedures and policies Recognises the implications of legal and regulatory responsibilities related to own work and is beginning to recognise some general legal principles applicable across work contexts |
| Interact with others | <ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role Collaborates and negotiates with others as part of familiar routine activities |
| Get the work done | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks for efficient and effective outcomes Implements standard procedures to make routine decisions Recognises and takes responsibility for addressing predictable problems in familiar work contexts Understands the importance of secure information in relation to own work |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| BSBPRC402 Negotiate contracts Release 1 | BSBPUR402 Negotiate contracts Release 1 | Updates to elements, performance criteria and assessment requirements | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC402 Negotiate contracts

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- prepare and conduct contract negotiations for the procurement of goods and/or services in accordance with organisational policies and procedures, including:
- using market analysis to evaluate suppliers
- determining objectives for contract negotiation
- arranging contract documentation and ensuring compliance
- using a range of effective and persuasive negotiation techniques
- demonstrating personal effectiveness in contract negotiation processes.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key provisions of relevant legislation, codes of practice and national standards that affect procurement of goods and/or services
- key principles of procurement contracts, including:
- organisational policies, procedures and relevant documentation for contract negotiation
- key legal requirements for the acquisition of goods and/or services
- organisation practices, policies and procedures for procurement
- procurement principles for:
 - accountability
 - probity and transparency
 - risk management
 - value for money.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement records
- sample contracts
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC403 Conduct international procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to conduct international procurement. This includes sourcing potential suppliers, inviting offers, evaluating the offers received, preparing recommendations and contracting the successful supplier. It also covers arranging importation of the goods, satisfying regulatory requirements, arranging required payments and ensuring all contractual obligations are met.

It applies to individuals who conduct international procurement activities to reduce cost and increase efficiency. Individuals will be able to demonstrate the ability to localise and implement sourcing strategies based on market analysis, business requirements, and organisational objectives. Individuals undertaking this unit are typically undertaking procurement in accordance with an organisation's international procurement guidelines and work under minimal supervision of a senior procurement manager or in consultation with senior management.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Source international suppliers | 1.1 Identify goods and/ or services to be procured internationally 1.2 Research potential sources of supply from relevant information |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>sources</p> <p>1.3 Examine market structures for proposed international procurement activities</p> <p>1.4 Determine regulations governing international procurement</p> <p>1.5 Source and apply relevant organisation procedures, policies and regulations govern the international procurement of goods and/ or services</p> |
| 2. Prepare invitations to offer for imported goods | <p>2.1 Obtain and clarify specifications of requirements for international sourcing of specified goods and/ or services from relevant stakeholders as required</p> <p>2.2 Select procurement strategy most appropriate to the proposed goods and/ or services</p> <p>2.3 Develop and document invitations to offer</p> <p>2.4 Ensure invitations to offer are checked for compliance with regulations, organisation policies and procedures and description of required goods and/ or services</p> <p>2.5 Develop, document and obtain approval for criteria for evaluating offers</p> <p>2.6 Issue invitations to offer to prospective suppliers after gaining approval from relevant personnel</p> |
| 3. Prepare recommendations in response to offers | <p>3.1 Receive and assess offer documents from suppliers against criteria and requirements of organisational procurement strategies</p> <p>3.2 Seek further information from suppliers, as required, to clarify offers</p> <p>3.3 Select preferred offer and make recommendation for approval to relevant personnel</p> <p>3.4 Consult with stakeholders and obtain approval for recommended offers</p> |
| 4. Action successful offers | <p>4.1 Prepare contract documentation with successful supplier</p> <p>4.2 Consult to ensure legality of contract agreements in accordance with organisation procedures</p> <p>4.3 Issue contract in accordance with received approval from stakeholders</p> <p>4.4 Inform unsuccessful offers of outcome of evaluation process in accordance with legal and organisation requirements</p> |
| 5. Arrange importation of | 5.1 Assess risks in ownership and logistics of goods and/ or |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| goods | <p>services throughout international procurement activity</p> <p>5.2 Seek agents as required to arrange inspection, packing, transport, importation, customs clearance and delivery of goods and/ or services</p> <p>5.3 Satisfy statutory and regulatory requirements including fumigation and export/import controls</p> <p>5.4 Ensure supply and logistics channels are managed, to achieve delivery of goods and/ or services satisfactorily and within designated timelines</p> |
| 6. Arrange provision of foreign currency payments | <p>6.1 Obtain advice from stakeholders on payment strategy to be followed for international procurement</p> <p>6.2 Receive arrangements made to initiate currency hedging, letter of credit or payment by direct cheque in accordance with advice</p> <p>6.3 Finalise and authorise payments at appropriate times according to organisational requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Gathers and analyses textual information from a range of sources and identifies relevant key information for work requirements |
| Writing | <ul style="list-style-type: none"> Develops clear workplace documents appropriate to audience and context Completes authorisations according to organisational procurement requirements |
| Oral Communication | <ul style="list-style-type: none"> Uses clear language and appropriate features to provide information to a variety of stakeholders and personnel Uses active listening and questioning techniques to convey and clarify information |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical data to determine procurement, insurance and foreign currency requirements |
| Navigate the world of work | <ul style="list-style-type: none"> Recognises and considers the implications of legal and regulatory responsibilities on own work Adheres to implicit and explicit organisational procedures and policies, seeking advice from others if necessary |

| | |
|----------------------|--|
| Interact with others | <ul style="list-style-type: none">• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Get the work done | <ul style="list-style-type: none">• Takes responsibility for systematically planning, sequencing and prioritising tasks according to agreed timelines• Uses systematic processes to gather and analyse information required to make decisions |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|--|--------------------|
| BSBPRC403 Conduct international procurement Release 1 | BSBPUR403 Conduct international purchasing Release 1 | Title change, updates to performance criteria, performance evidence, knowledge evidence and assessment requirements. | Equivalent unit. |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC403 Conduct international procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- apply market research techniques to source international suppliers for specified goods
- prepare and issue invitations to suppliers to procure goods and/ or services
- evaluate and process documentation to select successful supplier offers
- consult and obtain approval from stakeholders on preferred supplier
- prepare documentation and issue contracts with preferred suppliers
- inform unsuccessful suppliers of outcome of evaluation process
- arrange importation of goods and foreign currency payments
- evaluate risks and verify regulatory requirements of goods and/ or services to be procured internationally
- check that contractual conditions have been met, and take action if non-compliances are identified
- apply relevant legislation, regulations, codes of practice, standards and organisation policies and procedures
- undertake risk analysis activities related to international procurement
- apply principles of payments using foreign currency.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key principles and provisions of relevant legislation that affects business operations, codes of practice and national standards relevant to procurement
- range of industry accepted methods of payment applicable to international procurement

- standard organisational policies and procedures for international procurement
- risk factors and control measures relevant to international procurement
- Key range of agencies and organisations involved in arranging importation arrangements such as:
 - consultants
 - customs brokers
 - freight forwarders
 - logistics and transport companies
- key features of organisational policy to identify relevant insurance brokers and outline the range of available types of policies to cover risks of international procurement.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement records
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC406 Conduct e-procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to conduct e-procurement to source goods and/ or services in response to internal needs.

It applies to individuals who conduct online procurement of goods and/ or services from a variety of sources. While an individual may work closely with other staff members in the organisation, they have responsibility and autonomy to source quality goods and/ or services, monitor the procurement process and assess suppliers against organisation procurement policies and procedures.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration - Procurement

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify requirements and risks for e-procurement | 1.1 Research and identify goods and/ or services to be e-procured in accordance with organisational objectives 1.2 Assess risk and benefits associated with e-procurement of goods and/ or services in accordance with organisational policies and procedures 1.3 Document and discuss e-procurement risks and benefits with |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | organisational management |
| 2. Engage in e-procurement | 2.1 Create an e-procurement order for goods and/ or services 2.2 Electronically monitor the status of e-procured goods and/ or services against costs, timelines and organisational policies and procedures 2.3 Assist in the e-payment of third parties and identify rejected payments 2.4 Contribute to the development of e-procurement reports 2.5 Present report to organisational management for review |
| 3. Support organisational objectives through e-procurement | 3.1 Analyse the benefits of e-procurement against organisational objectives and identify areas for improvement 3.2 Review different e-procurement platforms that could assist in continuous improvement of organisational policies and procedures 3.3 Contribute to new ways of electronic working through improvements in e-procurement 3.4 Assist in consultation of stakeholders to gain buy-in to e-procurement strategies |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Analyses, matches and interprets information, paying attention to detail to identify errors |
| Writing | <ul style="list-style-type: none"> Records information accurately using correct spelling, grammar and terminology |
| Oral Communication | <ul style="list-style-type: none"> Uses questioning and active listening to convey and clarify information and instructions |
| Numeracy | <ul style="list-style-type: none"> Performs mathematical analysis to verify financial information |
| Navigate the world of work | <ul style="list-style-type: none"> Follows legislative requirements, and organisational protocols, policy and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Uses correct communication practices and protocols to obtain strategy approval from stakeholders |

| | |
|-------------------|---|
| Get the work done | <ul style="list-style-type: none">Plans, organises and implements tasks according to organisational and requirementsResponds to problems by implementing standard or logical solutions |
|-------------------|---|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|------------------------------------|----------|--------------------|
| BSBPRC406 Conduct e-procurement Release 1 | Not applicable | New unit | No equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC406 Conduct e-procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- contribute to e-procurement processes in an organisation, including:
 - researching and documenting e-procurement risks
 - monitoring e-procurement status electronically
 - assist in monitoring of timelines and costs
- evaluate and implement improvements to e-procurement strategies in an organisation.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of researching and identifying goods and/ or services to be e-procured
- assessment of key risks impacting e-procurement
- criteria and processes for assessing risk for e-procurement
- key requirements of electronic applications relating to e-procurement
- relevant legislation and organisation policies and procedures related to:
 - e-procurement terms and conditions for procurement
 - online transactions
 - continuous improvement.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – procurement and contracting field of work and include access to:

- relevant legislation and organisation policies and procedures
- procurement strategies and relevant procurement records
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC501 Manage procurement strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 2 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to develop, implement and evaluate an organisation's procurement strategies.

It applies to individuals focussing on the development, design and implementation of strategies to support the procurement of goods and/ or services. While an individual may work closely with other staff members in the organisation, they have individual responsibility and autonomy to develop, communicate and implement organisational procurement strategies.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication. TEST

Unit Sector

Administration – Purchasing and Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine procurement objectives | 1.1 Evaluate procurement strategies within organisation 1.2 Identify key strategic business units and their alignment to organisation objectives for procurement 1.3 Establish models for strategy development within organisation for procurement 1.4 Assess the relationship between procurement and strategic |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>organisation objectives</p> <p>1.5 Undertake consultations with relevant stakeholders and personnel to seek input into procurement strategies</p> |
| 2. Develop procurement strategies | <p>2.1 Analyse and develop procurement strategies, taking into account legal requirements and organisation policies</p> <p>2.2 Develop resourcing, financial and other plans to support implementation of procurement strategies</p> <p>2.3 Assess the impact of procurement strategies on broader organisation objectives</p> <p>2.4 Consult with stakeholders to confirm procurement strategy and its alignment to organisational objectives</p> |
| 3. Implement procurement strategies | <p>3.1 Determine resourcing requirements to implement procurement strategy</p> <p>3.2 Assist in implementation of procurement strategies</p> <p>3.3 Monitor activities associated with the implementation of procurement strategies</p> <p>3.4 Identify and address risks arising during the implementation of procurement strategies</p> <p>3.5 Manage performance reporting frameworks to understand efficiency and effectiveness of procurement strategy</p> |
| 4. Evaluate procurement strategies and implement improvements | <p>4.1 Review implementation of procurement strategies to assess areas for improvement</p> <p>4.2 Identify improvements to procurement strategies from review process</p> <p>4.3 Gain approval from stakeholders to implement improvements to procurement strategies</p> <p>4.4 Monitor and review implementation of improvements to determine their effectiveness</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------|-------------|
|-------|-------------|

| | |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets textual information from a range of sources and determines how content may be applied to organisational requirements |
| Writing | <ul style="list-style-type: none"> Develops complex material to convey explicit information and results using clear and detailed language appropriate to relevant audience and context |
| Oral Communication | <ul style="list-style-type: none"> Communicates verbally using clear language and appropriate features to provide information to a variety of individuals Uses active listening and questioning techniques to convey and clarify information |
| Numeracy | <ul style="list-style-type: none"> Interprets a range of numerical data to determine procurement objectives |
| Navigate the world of work | <ul style="list-style-type: none"> Appreciates the implications of organisational, legal and regulatory responsibilities that relate to own work |
| Interact with others | <ul style="list-style-type: none"> Liaises with suppliers and relevant stakeholders to negotiate agreement on procurement strategies Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Get the work done | <ul style="list-style-type: none"> Accepts responsibility for planning, prioritising and sequencing complex tasks and workload Uses analytical processes to generate and evaluate possible solutions to problems Reflects on outcomes to identify possible improvements |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|--|--------------------|
| BSBPRC501 Manage procurement strategies Release 1 | BSBPUR501 Develop, implement and review purchasing strategies Release 2 | Title change, updates to elements and performance criteria, performance and knowledge evidence | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC501 Manage procurement strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- undertake research and analysis of organisation objectives and policies
- develop procurement objectives and strategies for an organisation, including:
 - performance management frameworks
- implement procurement strategies developed in an organisation
- evaluate and implement improvements to procurement strategies in an organisation.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key provisions of relevant legislation that affect procurement and contracting
- key organisational business units
- key industry models for development of procurement strategy
- key components of organisational policies and procedures related to:
 - business terms and conditions for procurement
 - contracting and tendering
 - ethical behaviour
 - procurement processes.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement records
- office equipment and supplies
- case studies and, where possible, real situations.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC502 Manage supplier relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to manage relationships with suppliers of larger or multiple smaller procurement activities, where the relationship is of some significance to the organisation. It covers managing procurement agreements, resolving disagreements with suppliers, finalising agreements, and reviewing the performance of suppliers.

It applies to individuals who manage relationships with an organisation's suppliers, and is typically undertaken by a senior procurement officer or procurement manager.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Manage supplier agreements | 1.1 Monitor supplier performance throughout the duration of agreements in accordance with organisational policies and procedures 1.2 Identify, monitor and manage risks in risk management plans throughout the duration of agreements |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>1.3 Identify and address potential and actual performance issues</p> <p>1.4 Negotiate and resolve amendments to agreements as a consequence of addressing performance issues</p> <p>1.5 Seek and obtain approval for amendments from organisational management</p> <p>1.6 Communicate approved amendments to suppliers and relevant personnel</p> |
| 2. Resolve disagreements with suppliers | <p>2.1 Identify and investigate causes of disagreements with suppliers and assess their validity</p> <p>2.2 Negotiate and resolve disagreements</p> <p>2.3 Establish transparent and trust with supplier to support relationship</p> <p>2.3 Document amendments to agreements as a consequence of the resolution of disagreements in accordance with organisational policies and procedures</p> <p>2.4 Seek and obtain approval for amendments from organisational management</p> <p>2.5 Communicate approved amendments to suppliers and relevant personnel</p> |
| 3. Finalise agreements | <p>3.1 Confirm all supplier obligations as having been met prior to agreements being finalised</p> <p>3.2 Finalise procurement agreements on completion of contract</p> <p>3.3 Document arrangements to finalise agreements in accordance to organisational policies and procedures</p> |
| 4. Review performance of suppliers | <p>4.1 Evaluate supplier performance against the requirements of procurement agreements</p> <p>4.2 Inform suppliers of evaluation outcomes as required</p> <p>4.3 Make recommendations about future use of suppliers to relevant personnel</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets textual information from a range of sources and determines how content may be applied to organisational requirements |
| Writing | <ul style="list-style-type: none"> Documents amendments to agreements Develops documentation according to organisational formats |
| Oral Communication | <ul style="list-style-type: none"> Communicates verbally using clear language and appropriate features to provide information to a variety of individuals Uses active listening and questioning techniques to convey and clarify information |
| Numeracy | <ul style="list-style-type: none"> Interprets financial information within procurement agreements |
| Navigate the world of work | <ul style="list-style-type: none"> Understands legal and organisational obligations that underpin agreements and contracts with suppliers |
| Interact with others | <ul style="list-style-type: none"> Liaises with suppliers and relevant personnel to gain agreement on required performance levels Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Get the work done | <ul style="list-style-type: none"> Plans and implements tasks required to manage agreements, including negotiating and coordinating input from others Uses analytical processes to decide on a course of action, establishing criteria for deciding between options, and seeking input and advice from others Uses systematic, analytical processes to identify and solve performance problems |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|--|--------------------|
| BSBPRC502 Manage supplier relationships Release 1 | BSBPUR502 Manage supplier relationships Release 1 | Updates to elements and performance criteria, performance evidence and knowledge evidence. | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC502 Manage supplier relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- successfully manage relationships with suppliers over the life of specific procurement agreements in accordance with organisational policies and procedures, including:
 - using effective communication to resolve disputes with suppliers amending and developing documentation to finalise an agreement with a supplier
 - evaluate supplier performance and formulate recommendations about future use of supplier.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of procurement supplier relationship management
- methodologies to monitor, review and evaluate supplier performance
- key techniques to successfully manage and resolve supplier disagreements
- key features to outline organisation's policies and procedures related to:
 - conduct and ethics
 - procurement
 - tendering and contracting.
 -

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement supplier management records
- office equipment and supplies
- case studies and, where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC503 Manage international procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to manage international procurement of specific goods and/ or services within organisational policies and procedures, and regulatory frameworks.

It applies to individuals who are responsible for managing international procurement activities in an organisation. They develop and implement relevant supply chain management strategies, manage and review the implementation of improvements to international procurement strategies. They will be responsible for implementing management techniques to help them involve others, be innovative, consultative, influential and persuasive in order to achieve targets effectively.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop and document strategies for international procurement | 1.1 Research and analyse strategic implications for the organisation's international procurement of goods and/ or services 1.2 Research international market structures and determine the |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | benefits of global sourcing 1.3 Research and analyse export regulatory requirements of goods and/ or services to be procured internationally 1.4 Draft and submit for approval the organisation's strategies for international procurement |
| 2. Implement international procurement strategies | 2.1 Communicate international procurement strategies to relevant personnel and stakeholders 2.2 Provide support to stakeholders to implement international procurement strategies 2.3 Monitor implementation of international procurement strategies within the organisation 2.4 Identify and address problems and issues arising from implementation of international procurement strategies |
| 3. Monitor international procurement activities | 3.1 Evaluate cultural considerations potentially impacting international procurement activities 3.2 Research and assess the legal requirements on internationally procured goods and/ or services and their alignment with organisational strategies 3.3 Assess STEEPLE (social, technical, economic, environmental, legislative and ethical) factors and their impact and risks on international procurement activities 3.4 Evaluate suppliers and potential exception clauses 3.5 Clarify and resolve any discrepancies to the satisfaction of all parties 3.6 Prepare draft contract documentation and access legal expertise to check legality of contract agreement |
| 4. Determine payment strategies | 4.1 Analyse financial risk and implement available controls in accordance with organisational policies and procedures 4.2 Identify source and availability of funds for payment that cover goods and/ or services 4.3 Research and analyse currency payment methods and implication on acquisition of goods and/ or services 4.4 Select currency payment methods 4.5 Finalise processing of payment and confirm funds release with organisational management |
| 5. Determine logistics | 5.1 Determine requirements for pre-shipment inspection and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| strategies | arrange inspection 5.2 Research and analyse shipping facilities and other transport risks 5.3 Research and analyse regulatory compliance requirements for importation into Australia 5.4 Develop logistics strategies for the organisation taking into account appropriate transport, insurance and regulatory compliance requirements 5.5 Gain approval from relevant personnel for implementation of logistics strategies |
| 6. Evaluate international procurement strategies | 6.1 Review implementation of international procurement strategies and identify improvements 6.2 Design and develop improved international procurement strategies in accordance with organisational policies and procedures 6.3 Gain approval from organisational management to implement improvements to international procurement strategies 6.4 Communicate changes to relevant stakeholders and identify support provided to implement improvements 6.5 Monitor and review implementation of changes to determine effectiveness of improvements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Interprets complex textual information and determines how content may be applied to organisational requirements |
| Writing | <ul style="list-style-type: none">Develops and revises strategic, contractual and purchasing material to appropriate to audience and contextCompletes authorisations according to requirements |
| Oral Communication | <ul style="list-style-type: none">Uses clear language and appropriate features to provide information to a variety of individualsUses active listening and questioning techniques to convey and clarify information |

| | |
|----------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Interprets financial information and makes calculations when considering commercial risks, purchasing strategies and insurance requirements |
| Navigate the world of work | <ul style="list-style-type: none"> Contributes to organisation's strategic directions Adheres to implicit and explicit organisational policies and procedures Complies with all legal requirements relevant to own rights and responsibilities and considers the implications of these when negotiating, planning and undertaking work |
| Interact with others | <ul style="list-style-type: none"> Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience Collaborates with others to provide support and negotiate agreement |
| Get the work done | <ul style="list-style-type: none"> Develops plans to manage complex international purchasing activities in a timely and logical manner Uses analytical skills to consider potential and actual problems and implement solutions or contingency plans Monitors outcomes of decisions, considering results from a range of perspectives, and identifying key concepts and principles that may be adaptable to future situations |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|--|---|--------------------|
| BSBPRC503 Manage international procurement Release 3 | BSBPUR503 Manage international purchasing Release 2 | Title change, updates to elements and performance criteria, performance and knowledge evidence. | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC503 Manage international procurement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- undertake research and analysis of international procurement strategies
- effective communication and negotiation with stakeholders and suppliers
- design and develop international procurement strategies for an organisation, including:
 - implementation of international procurement strategies in an organisation
 - completion of a complex international purchase
 - assessment of financial records to complete payment for goods and/ or services
 - prepare contract documentation
 - evaluation of transport and logistics strategies to obtain goods and/ or services procured internationally.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of international markets and cultural considerations relevant to procurement in supplier countries
- key features of methods of payment applicable to international procurement
- contract documentation and processes for accessing legal advice
- key components of organisational policies and procedures for international procurement
- key details of available agencies involved in arranging importation arrangements such as:
 - consultants

- customs brokers
- freight forwarders
- logistics and transport companies.
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – purchasing and contracting field of work and include access to:

- organisation policies and procedures
- purchasing strategies and relevant purchasing records
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC504 Manage a supply chain

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to manage a supply chain, including the commercial and technical capabilities to ensure outcomes achieve organisational objectives.

It applies to individuals who are responsible for managing a supply chain in an organisation.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Procurement and Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop and implement a supply chain strategy | 1.1 Identify the organisation's objectives and the strategies for achieving them 1.2 Review current supply chain management strategy and how it delivers against organisational strategies 1.3 Assess supply chain opportunities that will add value to the organisation within the requirements of the strategy and budgetary allowance 1.4 Design and implement a supply chain strategy that increases effectiveness and achieves organisational objectives |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>1.5 Gain commitment of stakeholders to implement supply chain strategy</p> <p>1.6 Assign responsibility to monitor supply chain strategy to relevant personnel</p> |
| 2. Manage the flow of supplies through the supply chain | <p>2.1 Obtain information on the specifications of supplies in the supply chain</p> <p>2.2 Clarify the aims, objectives and plans of supplies against organisational policies and procedures</p> <p>2.3 Allocate supply chain tasks to self and other personnel</p> <p>2.4 Support personnel to achieve supply chain tasks and milestones</p> <p>2.5 Monitor and control the achievement of supply chain objectives against cost and timescales</p> <p>2.6 Present reports on the results of supply chain outcomes to stakeholders</p> |
| 3. Manage supply chain relationships and activities | <p>3.1 Apply portfolio analysis techniques to assess relationships in supply chains in accordance with the supply chain management strategy</p> <p>3.2 Evaluate financial, technical and performance data of suppliers in accordance with supply chain strategies</p> <p>3.3 Identify opportunities to adjust supply chain strategies to respond to the changing needs of customers, supply chain and organisational objectives</p> <p>3.4 Design and implement a framework to promote collaboration with suppliers to achieve a competitive advantage</p> <p>3.5 Consult with organisation management to confirm progress of supply chain activities in accordance to organisational objectives</p> |
| 4. Evaluate and improve supply chain effectiveness | <p>4.1 Review the effectiveness of current relationships within the supply chain in accordance with the supply chain management strategy</p> <p>4.2 Compare supply chain management models to determine most appropriate infrastructure to support organisational objectives</p> <p>4.3 Assess techniques to support the development of innovation in the supply chain</p> <p>4.4 Analyse cost reduction activities for a supply chain to achieve organisational objectives</p> <p>4.5 Consolidate analysis and evaluation results to improve future supply chain management strategies and seek feedback from</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|-------------------------|
| | organisation management |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Gathers and analyses textual information from a range of sources and identifies relevant and key information to assist in the supply chain management process |
| Writing | <ul style="list-style-type: none"> Designs, develops and revises strategic documents appropriate to audience and context |
| Oral Communication | <ul style="list-style-type: none"> Uses clear language and appropriate features to provide information to a variety of individuals Uses active listening and questioning techniques to convey and clarify information |
| Numeracy | <ul style="list-style-type: none"> Analyses and compares financial information to assist in managing, evaluating and improving the supply chain |
| Navigate the world of work | <ul style="list-style-type: none"> Contributes to organisation's strategic directions by developing and revising organisational policies and procedures Complies with all legal requirements relevant to own responsibilities and considers the implications of these when negotiating, planning and undertaking work |
| Interact with others | <ul style="list-style-type: none"> Actively identifies the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction |
| Get the work done | <ul style="list-style-type: none"> Develops plans to manage complex supply chain activities, with an awareness of how they contribute to strategic goals Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of factors into account Monitors outcomes of decisions, considering results from a range of perspectives, and identifying key concepts and principles that may be adaptable to future situations Actively identifies digital systems, devices and applications with potential to meet current or future needs |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBPRC504 Manage a supply chain Release 1 | BSBPUR504 Manage a supply chain Release 1 | Updates to elements and performance criteria, performance and knowledge evidence. | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC504 Manage a supply chain

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- critically evaluate organisational supply chain management
- successfully manage a supply chain in accordance with organisational policies and procedures, including:
 - implement a supply chain strategy
 - monitor supply chain activities
 - co-ordinate staff and engage relevant stakeholders
 - liaise with suppliers to drive efficiencies
- evaluate and formulate recommendations to improve supply chain management strategy.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key features of organisational objectives and their relationship to the supply chain strategy
- key requirements relating to the management of a supply chain, including:
 - organisational policies and procedures for procurement, tendering and contracting
 - contracting and tendering
 - ethical behaviour
 - purchasing and procurement
 - supply chain management
- techniques to establish collaborative relationships

- relevant legislation, regulations, standards and organisation policies.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – procurement and contracting field of work and include access to:

- organisation policies and procedures
- supply chain strategies and relevant supply chain management records
- office equipment and supplies
- case studies and, where possible, real situations in the workplace.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPRC505 Manage ethical procurement strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to employ ethical procurement processes and policies to identify suppliers' contribution to improve the ethics of that specific supply chain, such as waste, water, emissions, materials, service and innovation.

It applies to individuals who manage the ethical procurement of goods and/ or services from a variety of sources. While an individual may work closely with other staff members in the organisation, they have individual responsibility and autonomy to identify ethical procurement risks, develop management programmes and evaluate suppliers against organisation ethical procurement policies and procedures.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Procurement - Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify vulnerability and risk associated with procurement | 1.1 Research and identify ethical procurement policies and procedures and their alignment to organisational objectives 1.2 Determine specifications of goods and/ or services to be procured 1.3 Assess ethical vulnerabilities and risks associated with |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>procurement of goods and/ or services in accordance with organisational policies and procedures</p> <p>1.4 Document and report ethical procurement vulnerabilities and risks to stakeholders</p> |
| 2. Develop ethical procurement strategy | <p>2.1 Develop organisational ethical procurement strategy in accordance with organisational policies and procedures</p> <p>2.2 Assign responsibility to relevant personnel for the monitoring of ethical procurement strategy</p> <p>2.3 Seek endorsement of ethical procurement strategy from organisational management</p> |
| 3. Evaluate suppliers and offers | <p>3.1 Engage suppliers in ethical procurement objectives</p> <p>3.2 Analyse supplier ethical procurement against key performance indicators</p> <p>3.3 Evaluate and select suppliers with negative ethical procurement impacts</p> <p>3.4 Confirm and agree chosen supplier with organisational management</p> |
| 4. Create contract and performance indicators | <p>4.1 Establish contract documentation in accordance with ethical procurement strategies and organisational policies and procedures</p> <p>4.2 Communicate the contents of the contract, emphasising ethical procurement requirements</p> <p>4.3 Determine arrangements for delivery of goods and/ or services to be satisfactory to both organisation and supplier</p> <p>4.4 Implement relevant ethical procurement key performance indicators to measure supplier against organisational objectives</p> <p>4.5 Establish ongoing dialogue with supplier to facilitate transparency and accountability</p> |
| 5. Evaluate and update ethical procurement strategy | <p>5.1 Evaluate supplier against ethical procurement performance indicators</p> <p>5.2 Undertake gap analysis between desired and actual performance, and establish new goals</p> <p>5.3 Embed recognition and reward for good supplier practice</p> <p>5.4 Consult with stakeholders to confirm revised ethical procurement strategy</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none">Analyses, matches and interprets information, paying attention to detail to identify errors |
| Writing | <ul style="list-style-type: none">Records information accurately using correct spelling, grammar and terminology |
| Oral Communication | <ul style="list-style-type: none">Uses questioning and active listening to convey and clarify information and instructions |
| Numeracy | <ul style="list-style-type: none">Performs mathematical analysis to verify financial information |
| Navigate the world of work | <ul style="list-style-type: none">Follows legislative requirements, and organisational protocols, policy and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none">Uses correct communication practices and protocols to obtain strategy approval from stakeholders |
| Get the work done | <ul style="list-style-type: none">Plans, organises and implements tasks according to organisational requirementsResponds to problems by implementing standard or logical solutions |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|------------------------------------|----------|--------------------|
| BSBPRC505 Manage ethical procurement strategy Release 1 | Not applicable | New unit | No equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPRC505 Manage ethical procurement strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- develop ethical procurement strategies for an organisation, including:
 - researching and documenting ethical procurement vulnerabilities and risks
 - evaluating suppliers through ethical procurement performance indicators
- liaise with stakeholders and suppliers to effectively facilitate ethical procurement
- evaluate and implement improvements to procurement strategies in an organisation.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role:

- key provisions of relevant legislation that affect procurement and contracting
- key indicators to evaluate ethical procurement supplier performance
- key ethical procurement vulnerabilities and risks
- organisational policies and procedures related to:
 - ethical business terms and conditions for procurement
 - contracting and tendering
 - supply chain management
 - procurement.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – procurement and contracting field of work and include access to:

- organisation policies and procedures
- procurement strategies and relevant procurement records
- office equipment and supplies
- case studies and, where possible, real situations.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBPUR301 Purchase goods and services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to determine purchasing requirements and make and receive purchases.

It applies to individuals who work under a level of supervision and who conduct low risk, low expenditure purchasing for an organisation using established and documented purchasing strategies. Individuals may be working in a small organisation with general responsibility for conducting purchasing within an organisation, or they may be a purchasing specialist working in a large organisation. Some judgement may be required to make decisions about purchasing strategies.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Purchasing and Contracting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Understand purchasing and own requirements | 1.1 Read, understand and clarify organisation's purchasing strategies as required 1.2 Determine own role and limits of authority in consultation with relevant personnel |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------|--|
| 2. Make purchases | 2.1 Receive purchase specifications from relevant personnel and clarify as required 2.2 Select purchasing methods most appropriate to particular purchases within limits of own role 2.3 Obtain approvals for purchases as required 2.4 Obtain quotations from suppliers as required 2.5 Select suppliers, place orders and make purchases |
| 3. Receive purchases | 3.1 Receive goods or make arrangements to receive services 3.2 Advise relevant personnel of receipt of purchase 3.3 Ensure goods received are checked for compliance with specifications 3.4 Take action to resolve non-compliance with specifications 3.5 Facilitate registration of new assets 3.6 File and store purchase records |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---------------------------------------|---|
| Reading | 1.1, 2.1, 2.2, 3.3, 3.4 | <ul style="list-style-type: none"> Gathers and interprets a range of textual information to identify relevant key information |
| Writing | 1.1, 1.2, 2.1, 2.5, 3.1, 3.2, 3.5 | <ul style="list-style-type: none"> Creates everyday workplace documentation using terminology and format relevant to audience and purpose |
| Oral Communication | 1.1, 1.2, 2.1, 2.3-2.5, 3.1, 3.2, 3.4 | <ul style="list-style-type: none"> Uses suitable language to liaise with suppliers and clarify information within the organisation Uses active questioning and listening techniques to confirm requirements |
| Numeracy | 2.1, 2.4, 2.5 | <ul style="list-style-type: none"> Interprets simple numerical data and makes basic calculations to determine costs of goods and services |
| Navigate the world of work | 1.1, 2.1, 3.3, 3.4 | <ul style="list-style-type: none"> Adheres to organisational procedures and policies Understands how own role connects with others and contributes to broader work goals |

| | | |
|----------------------|-----------------------------|--|
| Interact with others | 1.1, 1.2, 2.1, 2.3-2.5, 3.2 | <ul style="list-style-type: none"> Selects from a small range of communication modes, forms and channels to meet a specific purpose within the immediate work environment Seeks to cooperate with others to achieve results in immediate work context |
| Get the work done | 1.2, 2.2, 2.5, 3.4-3.6 | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising tasks for efficient and effective outcomes Responds to predictable routine problems and implements standard or logical solutions Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBPUR301 Purchase goods and services | BSBPUR301B Purchase goods and services | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBPUR301 Purchase goods and services

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- obtain quotes from prospective suppliers
- select appropriate purchasing methods
- receive, check and document purchases.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline organisation policy and procedures relating to:
 - purchasing strategies
 - recordkeeping systems related to purchasing and assets
 - standard contracting arrangements
- explain purchasing and procurement principles for:
 - accountability
 - probity and transparency
 - risk management
 - value for money.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the administration – purchasing and contracting field of work and include access to:

- organisation policies and procedures

- purchasing strategies and relevant purchasing records
- office equipment and resources.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR301 Contribute to continuous improvement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to support continuous improvement in an organisation. Particular emphasis is on actively encouraging teams to participate in the process, monitoring and reporting on specified outcomes and supporting opportunities for further improvements.

The unit applies to individuals who use initiative, and organisational and communication skills to influence the ongoing development of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Coordinate continuous improvement | 1.1 Communicate objectives and continuous improvement processes of the organisation to team members 1.2 Establish roles and skills within the team and identify training needs and performance improvement opportunities 1.3 Encourage team members to participate in decision making processes and exercise initiative |
| 2. Monitor and report specified outcomes | 2.1 Monitor team progress using systems and technology of the organisation and identify ways planning and operations could be improved 2.2 Report changes to processes and training to relevant |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | stakeholders 2.3 Develop plans, in collaboration with team members, to apply continuous improvement techniques and processes |
| 3. Support opportunities for further improvement | 3.1 Communicate recommendations for improvements in achieving organisational objectives to team members 3.2 Monitor work performance and support team members to identify further opportunities for improvement 3.3 Maintain records, reports and recommendations for improvement within the organisation's systems and processes |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Learning | <ul style="list-style-type: none"> Contributes to ongoing organisational improvement by mentoring others to support continuous improvement processes |
| Reading | <ul style="list-style-type: none"> Interprets everyday workplace documentation |
| Writing | <ul style="list-style-type: none"> Uses appropriate vocabulary and grammatical structures to achieve precise meaning in a range of documentation |
| Oral communication | <ul style="list-style-type: none"> Articulates information in a positive manner using appropriate terminology, tone and style appropriate to context and audience Uses questioning and listening techniques to exchange and clarify information |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies the nature and purpose of own role and associated responsibilities and how own role relates to others and contributes to broader work goals Takes responsibility for adherence to organisational processes and systems |
| Teamwork | <ul style="list-style-type: none"> Shares information and resources, offers assistance and facilitates effective group interactions |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for routine low-impact decisions within familiar situations Evaluates effectiveness of decisions in terms of how well they meet stated goals |
| Technology | <ul style="list-style-type: none"> Uses a range of digitally based technology and applications to organise, monitor, manage and communicate relevant information effectively |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBFLM309 Support continuous improvement systems and processes
- BSBINN201 Contribute to workplace innovation.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSTR301 Contribute to continuous improvement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- coordinate, monitor and support the continuous improvement of a work task for a team or work area.

In the course of the above, the candidate must:

- identify options and benefits for improvements
- address barriers to continuous improvement
- use analysis work performance to identify improvement opportunities
- use technology to monitor operational progress
- apply recordkeeping processes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- principles and techniques relating to:
 - continuous improvement systems and processes
 - benchmarking
 - best practice
- benefits and barriers to continuous improvement
- quality approaches that may be implemented in an organisation
- methods that can be used in continuous improvement
- organisational recording, reporting and recommendation processes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR401 Promote innovation in team environments

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify and implement ways of promoting innovation within team environments in the workplace.

The unit applies to individuals who are team participants or team leaders responsible for playing a proactive role in demonstrating innovation in a formal or informal team environment.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify opportunities to maximise innovation | 1.1 Identify team requirements relating innovation 1.2 Determine team dynamic and own relationship with team 1.3 Assist in evaluating team requirements according to workplace policies and procedures 1.4 Assist in identifying team's current ways of working according to team objectives 1.5 Assist in identifying opportunities in areas for innovation 1.6 Assist in creating processes that allow team members to suggest options for innovation and innovative ideas |
| 2. Organise and agree on effective ways of | 2.1 Identify ideas for ways of working better |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| working | 2.2 Delegate responsibilities across the team, and encourage and reinforce team-based innovation 2.3 Agree and share responsibilities and confirm best use of team strengths and abilities 2.4 Schedule activities that allow time for thinking, challenging and collaboration 2.5 Establish reward and stimulation as an integral part of the team's way of working |
| 3. Support and guide colleagues to promote innovation | 3.1 Demonstrate behaviour that supports innovation within team 3.2 Create an environment for staff to proactively share information, knowledge and experiences with other team members 3.3 Dedicate time with team members to challenge and test ideas 3.4 Discuss and explore innovation ideas with other team members |
| 4. Evaluate innovation ideas and promotion | 4.1 Identify criteria to review successful innovation in the workplace 4.2 Share innovation successes and examples of successful innovation within own workplace 4.3 Reflect on implemented innovation ideas 4.4 Seek and respond to feedback from relevant stakeholders to generate discussion and identify improvements in promoting innovation 4.5 Discuss with relevant stakeholders the challenges of being innovative 4.6 Document feedback received for improvements in promoting innovation for future activities |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses textual information, from a wide range of sources, to identify information relevant to team activities |
| Writing | <ul style="list-style-type: none"> Uses clear language and formats appropriate for the audience to highlight and present specific information |
| Oral communication | <ul style="list-style-type: none"> Actively participates in verbal exchanges of ideas and elicits the views and opinions of team members by listening and questioning Uses clear language to clarify rules and roles relating to team |

| SKILL | DESCRIPTION |
|---------------------------|---|
| | activities in formal and informal situations |
| Numeracy | <ul style="list-style-type: none">• Interprets numeric information relevant to team activities |
| Planning and organising | <ul style="list-style-type: none">• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role |
| Teamwork | <ul style="list-style-type: none">• Uses inclusive techniques to initiate, contribute and promote discussion amongst potentially diverse team members• Recognises the importance of establishing and building effective working relationships |
| Planning and organising | <ul style="list-style-type: none">• Plans, sequences and prioritises tasks for efficient and effective outcomes |
| Problem solving | <ul style="list-style-type: none">• Uses problem-solving processes to address less predictable problems, and when appropriate, seeking input from others• Contributes to continuous improvement of current work practices by applying basic principles of analytical and lateral thinking• Reflects on outcomes and further explores own and the team's role in implementing innovation |
| Initiative and enterprise | <ul style="list-style-type: none">• Understands the nature and purpose of own role and how it affects others in the work context |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBINN301 Promote innovation in a team environment.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSTR401 Promote innovation in team environments

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions assist a team to create an innovative team environment.

In the course of the above, the candidate must:

- encourage others to contribute to innovation
- identify ways of working
- implement and communicate improvements
- plan and schedule activities
- reflect on activities, feedback and challenges to identify improvement options
- model open and respectful communications
- contribute to the make-up and rules of the team.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- types of innovation and their benefits
- ways of working, including:
 - working hours
 - working spaces
 - agile working
- workplace policies and procedures
- internal and external factors that contribute to a team becoming and remaining innovative, including:
 - team characteristics
 - role of group dynamics and diversity
 - broader environmental factors

- activities that can encourage and hinder innovation in a team, including:
 - allocation of time and activities
 - modelling behaviour
 - rewards and recognition
 - communications
 - feedback.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR402 Implement continuous improvement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to implement continuous improvement of systems and processes of an organisation. It includes using systems and strategies to encourage the team to participate in the process, monitoring and reviewing performance, and identifying opportunities for further improvements.

The unit applies to managers who are responsible for implementing the continuous improvement process to achieve the objectives of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify and plan for improvement | <ul style="list-style-type: none">1.1 Identify relevant stakeholders and establish improvements required1.2 Identify where new systems and processes could be implemented1.3 Promote team involvement in decision making processes for team systems and processes1.4 Communicate and agree on new improvement systems and processes with relevant stakeholders1.5 Manage reports and recommendations for using systems and processes of the organisation |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 1.6 Establish risk review processes |
| 2. Monitor implementation of continuous improvement | 2.1 Use workplace systems and technology, and monitor team performance according to organisational policies and procedures 2.2 Implement new systems and processes in consultation with relevant stakeholders 2.3 Maintain new system and processes in consultation with relevant stakeholders 2.4 Identify and resolve system and process issues |
| 3. Evaluate implementation of continuous improvement | 3.1 Communicate productivity improvements to relevant stakeholders and confirm their understanding 3.2 Seek and respond to feedback from relevant stakeholders on proposed improvement systems and process 3.3 Review improvement systems and process, and make changes, as required |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Evaluates and integrates facts and ideas to construct meaning from a range of text types in order to implement continuous improvement systems and processes |
| Writing | <ul style="list-style-type: none"> Selects vocabulary, grammatical structures and conventions appropriate to text Researches, plans and prepares continuous improvement documentation for required stakeholders |
| Oral communication | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges with a range of audiences using structure and language to suit the audience |
| Initiative and enterprise | <ul style="list-style-type: none"> Monitors adherence to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment Recognises the potential of new approaches to enhance work practices and outcomes Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering required information and identifying and evaluating options against agreed criteria |

| SKILL | DESCRIPTION |
|-------------------------|--|
| Teamwork | <ul style="list-style-type: none">• Selects and uses required conventions and protocols when communicating with diverse individuals to seek and share information• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group communication, influencing direction and taking a leadership role on occasion |
| Self-management | <ul style="list-style-type: none">• Evaluates effectiveness of decisions in terms of how well they meet stated goals |
| Technology | <ul style="list-style-type: none">• Uses digital applications to access and filter data, extract, organise, integrate and share required information |
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning and organising own workload to achieve required outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT403 Implement continuous improvement.

Supersedes but is not equivalent to:

- BSBCON401 Work effectively in a business continuity context
- BSBMGT406 Plan and monitor continuous improvement.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSR402 Implement continuous improvement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement at least one continuous improvement system or process in an organisation or work area.

In the course of the above, the candidate must:

- provide support to enable individuals and teams to participate in decisions, take responsibility, show initiative and implement improvement processes
- communicate effectively to support the implementation of improvements and improvement system and processes
- implement, monitor and update improvement plans, processes and procedures to improve performance
- document performance to identify further opportunities for improvement
- manage records and reports in the systems and procedures of the organisation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- continuous improvement systems and processes
- coaching and mentoring needs to support continuous improvement
- change management techniques that support continuous improvement and initiative
- organisation's systems and data used for benchmarking and monitoring performance for continuous improvement.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR501 Establish innovative work environments

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to create an environment that enables and supports practice which focuses on a holistic approach to the integration of innovation across all areas of work practice.

The unit applies to individuals working in leadership or management roles in any industry or community context. The individual could be employed by the organisation, but may also be an external contractor, the leader of a cross organisation team or of a self-formed team of individuals.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Establish work practices | 1.1 Identify relevant stakeholders 1.2 Identify organisational objectives and practices 1.3 Evaluate current work conditions 1.4 Determine working conditions that allow innovative practices according to organisational policies and procedures 1.5 Identify organisational resources relating to innovation 1.6 Build and lead team and maximise opportunities for innovation |
| 2. Create an innovative | 2.1 Evaluate the impacts of changing work environment |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| environment | 2.2 Collaborate with stakeholders and develop ideas for enhancing work environment 2.3 Identify and select resources required for enhancing work environment 2.4 Assess the ability of the workspace to support innovation 2.5 Assist team members to adapt and perform in new work environment |
| 3. Implement innovative work environment | 3.1 Encourage creative mindsets, collaborative working and development of positive workplace relationships 3.2 Reinforce the value of innovation according to organisational vision and objectives 3.3 Take risks to open up opportunities for innovation 3.4 Select ways of celebrating and encouraging innovation 3.5 Encourage and support evaluation of innovative ideas |
| 4. Share and evaluate innovative ideas and work environment | 4.1 Share relevant information, knowledge and skills on innovative practices with stakeholders 4.2 Provide and encourage formal and informal learning opportunities to develop skills required for innovation 4.3 Create opportunities where individuals can learn from the experience of others 4.4 Seek and respond to suggestions, improvements and innovations from all team members |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and evaluates information that may deal with complex ideas related to issues both within and outside a given workplace context |
| Writing | <ul style="list-style-type: none"> Develops information for others using language to suit the context and audience |
| Oral communication | <ul style="list-style-type: none"> Presents ideas and concepts to a range of audiences using structure and language to suit the audience Uses active listening and questioning to discuss and clarify information and to confirm understanding |
| Self-management | <ul style="list-style-type: none"> Takes responsibility for implementing practices and procedures to achieve organisational objectives in innovation according to role |

| SKILL | DESCRIPTION |
|---------------------------|--|
| | <p>requirements</p> <ul style="list-style-type: none">• Accepts responsibility for planning and implementing tasks and practices to achieve organisational goals, negotiating key aspects with others and taking into account current capabilities and needs |
| Initiative and enterprise | <ul style="list-style-type: none">• Develops new and innovative ideas through exploration, evaluation, analysis and critical thinking |
| Teamwork | <ul style="list-style-type: none">• Uses required communication techniques to build rapport and foster strong relationships with co-workers in a range of work contexts• Uses inclusive and collaborative techniques to share, promote and convey complex information about new ideas and systems within the workplace• Facilitates a climate where people feel comfortable suggesting and discussing improvements and new ideas |
| Problem Solving | <ul style="list-style-type: none">• Uses problem solving processes to identify, assess and respond to challenges and risks around innovation |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBINN501 Establish systems that support innovation
- BSBINN502 Build and sustain an innovative work environment.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSTR501 Establish innovative work environments

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- establish at least two different procedures and practices that foster innovation in areas of work practice, including at least three of the following:
 - collaborative work arrangements
 - building team capacity to contribute to innovation
 - providing formal and informal learning opportunities
 - evaluating ideas of innovation in work environment
 - celebrating and encouraging innovation
 - consulting with relevant stakeholders
 - changing physical work environment, including designing, fitting-out and decorating workspaces
 - communicating and sharing of ideas and feedback.

In the course of the above, the candidate must:

- reinforce the value of innovation to the vision and objectives of the organisation
- model behaviour, including:
 - being receptive to ideas
 - giving constructive advice
 - establishing and maintaining relationships based on mutual respect and trust
 - taking considered risks that provide opportunities for innovation
- support innovation and collaboration of ideas to make improvements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- concepts and theories of innovation

- context for innovation in the workplace, including:
 - core business values
 - overall objectives
 - broader environmental context
 - value and benefit of innovative ideas and projects
- factors and tools that motivate individuals
- creative thinking and innovative work practices
- ways of celebrating and promoting innovation in the workplace
- approaches to management and leadership and how they support and hinder innovation
- challenges and barriers to innovation and ways of overcoming them, including:
 - rewarding and celebrating innovation
 - coaching and learning
 - modelling behaviour and managing the physical environment.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation and codes of practice
- relevant organisational policies and procedures
- workplace equipment and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR502 Facilitate continuous improvement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead and manage continuous improvement systems and processes. Particular emphasis is on the development of systems and the analysis of information to monitor and adjust performance strategies, and to manage opportunities for further improvements.

The unit applies to individuals who take an active role in managing a continuous improvement process in order to achieve an organisation's objectives. At this level, work will normally be carried out using complex and diverse methods and procedures which require the exercise of considerable discretion and judgement, using a range of problem-solving and decision-making strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish systems and processes | 1.1 Identify current systems and processes that facilitate continuous improvement 1.2 Identify and define improvement needs and opportunities for the organisation 1.3 Develop decision-making processes to assist continuous improvement and communicate to relevant stakeholders 1.4 Develop strategies for continuous improvement and encourage |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>team members to participate in decision-making processes</p> <p>1.5 Develop knowledge management systems to capture team progress, insights and experiences from business activities</p> <p>1.6 Develop new systems and processes that facilitate continuous improvement according to improvement needs and opportunities</p> <p>1.7 Establish processes that confirm team members are informed about continuous improvement outcomes</p> |
| 2. Monitor and adjust performance strategies | <p>2.1 Confirm relevant systems and processes meet organisation sustainability requirements</p> <p>2.2 Confirm team progress, insights and experiences are captured and accessible using knowledge management systems</p> <p>2.3 Coach individuals and teams to implement and support continuous improvement systems and processes</p> <p>2.4 Identify and evaluate ways in which planning and operations could be improved</p> <p>2.5 Make recommendations and communicate strategies to relevant stakeholders</p> |
| 3. Manage opportunities for further improvement | <p>3.1 Evaluate outcomes and identify opportunities for improvement</p> <p>3.2 Seek feedback from relevant stakeholders on systems and processes</p> <p>3.3 Identify other areas for improvement and document feedback for future planning</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none">Identifies and extracts required information from a range of complex textsLocates, interprets and analyses workplace documentation to gather information relating to continuous improvement |
| Writing | <ul style="list-style-type: none">Develops complex texts related to continuous improvement processes according to organisational requirementsEnsures the vocabulary, grammatical structures and conventions are required for the context and target audience |
| Oral | <ul style="list-style-type: none">Presents information to a range of audiences using appropriate structure and language |

| SKILL | DESCRIPTION |
|---------------------------|---|
| communication | <ul style="list-style-type: none">• Listens and comprehends information from a variety of spoken exchanges with clients, co-workers and other stakeholders• Confirms understanding through questioning and active listening |
| Initiative and enterprise | <ul style="list-style-type: none">• Monitors adherence to organisational policies, procedures and protocols and considers own role in terms of its contribution to broader goals of the work environment• Identifies and uses appropriate conventions and protocols when communicating with colleagues and external stakeholders |
| Problem solving | <ul style="list-style-type: none">• Uses analytical and lateral thinking to review current practices and develop ideas for improvement |
| Teamwork | <ul style="list-style-type: none">• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and influencing direction |
| Self-management | <ul style="list-style-type: none">• Takes responsibility for developing, implementing and monitoring systems and processes to achieve organisational outcomes |
| Technology | <ul style="list-style-type: none">• Reflects on the ways in which digital systems and tools are used, or could be used, to achieve work goals |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT516 Facilitate continuous improvement.

Supersedes but is not equivalent to BSBCUE501 Develop business continuity strategy.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBS TR502 Facilitate continuous improvement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead and manage continuous improvement systems and processes for at least one organisation or work area.

In the course of the above, the candidate must:

- address organisational sustainability requirements
- incorporate mentoring, coaching and other support to enable individuals to participate in continuous improvement processes
- capture progress, insights and experiences using established knowledge management systems
- encourage participation in decision making processes and ideas for continuous improvement.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- systems and processes facilitating continuous improvement
- common decision-making processes
- organisational policies and procedures relating to digital systems, decision-making processes and continuous improvement systems
- business systems and requirements, including:
 - knowledge management
 - quality
 - sustainability
 - performance management.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- organisational policies and procedures relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR503 Develop organisational policy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and review policy in an organisation. It covers anticipating and confirming the need for policy development or review; planning the policy development process; gathering and analysing information; determining policy direction; and drafting, releasing and promoting policy.

The unit applies to managers who draft and review policy that is formulated to facilitate the implementation of decisions made by senior executives, business owners and boards of management or similar.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review existing policy | 1.1 Identify existing policies in the organisation 1.2 Analyse existing policies according to organisational procedures 1.3 Evaluate improvement needs and opportunities 1.4 Consult with relevant stakeholders and confirm need for new policy development |
| 2. Establish need for policy development | 2.1 Identify internal and external factors likely to cause changes to organisation policy 2.2 Consult with relevant stakeholders and document impacts of |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>factors identified</p> <p>2.3 Analyse need for new policy against internal and external environment and existing policies</p> <p>2.4 Identify and recommend to relevant stakeholders priority areas for policy development according to organisational procedures</p> <p>2.5 Identify and analyse associated issues and risks likely to impact policy development</p> <p>2.6 Implement risk management processes</p> |
| 3. Prepare for and develop policy | <p>3.1 Identify type of information required to develop policy</p> <p>3.2 Outline policy requirements according to organisational procedures</p> <p>3.3 Develop an analytical framework for the development of policy</p> <p>3.4 Source, analyse and apply relevant information to support policy development according to organisational policies and procedures</p> <p>3.5 Develop, consult with and recommend to relevant stakeholders a range of policy options and assessment criteria</p> <p>3.6 Obtain approvals from stakeholders according to the policy development plan and organisational policies and procedures</p> <p>3.7 Draft policy according to consultations, feedback and organisational policies and procedures</p> <p>3.8 Facilitate agreement to policy via organisational channels and relevant stakeholders</p> |
| 4. Release and review policy development process and policy | <p>4.1 Communicate with relevant stakeholders responsible for implementing new policy</p> <p>4.2 Facilitate discussion and manage dissenting stakeholders</p> <p>4.3 Release and promote the policy according to organisational requirements</p> <p>4.4 Seek feedback and respond to relevant stakeholders for future improvements for policy development</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Analyses and interprets textual information from a range of sources to inform policy review and development |

| SKILL | DESCRIPTION |
|---------------------------|---|
| Writing | <ul style="list-style-type: none">• Develops texts dealing with complex ideas and concepts using specialised and detailed language to convey explicit information according to compliance and organisational requirements• Prepares written reports and workplace documentation that communicates strategy and intent clearly and effectively and elicits feedback |
| Oral communication | <ul style="list-style-type: none">• Uses specialised vocabulary to discuss and confirm policy development requirements adjusting words and features to suit audience and context |
| Initiative and enterprise | <ul style="list-style-type: none">• Adapts communication style to build positive working relationships and to show acknowledgement of the opinions of others |
| Learning | <ul style="list-style-type: none">• Recognises, understands and applies organisational policies, procedures and protocols |
| Self-management | <ul style="list-style-type: none">• Takes responsibility for planning and implementing tasks required to achieve organisational objectives• Seeks advice, feedback and support, as required to assist in the development, planning, review and implementation phases |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT518 Develop organisation policy.

Supersedes but is not equivalent to BSBGOV503 Conduct organisational strategic planning.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSTR503 Develop organisational policy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop, revise and promote at least one policy.

In the course of the above, the candidate must:

- plan, develop and implement policy using iterative and consultative processes with input from representative stakeholders
- analyse internal and external factors
- consult with stakeholders to identify needs for policy review and policy development
- develop analytical framework
- ensure style and format requirements for organisational policy documentation is followed
- promote policy.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- policy development processes and practices
- risk management processes
- existing policies and improvements needs and opportunities
- stakeholder and issues management strategies
- quality assurance, monitoring and evaluation mechanisms
- operation of policy cycles
- legislative and regulatory context required to develop organisation policies
- organisational channels to promote policy
- key components of policy, including:
 - different policy options
 - implementation plan that details:

- responsibilities for implementation
- strategies for transition, change management, initial and ongoing training and policy maintenance mechanisms for monitoring compliance with the policy, quality assurance and evaluation of the policy.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence
- relevant organisational policies and procedures
- relevant legislation and codes of practice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR601 Manage innovation and continuous improvement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to sustain and develop an environment in which continuous improvement, innovation and learning are promoted and rewarded.

The unit applies to individuals with managerial responsibilities who aim to build a better and more effective work environment. Continuous improvement and innovation have links with the model of the learning organisation and people working at this level play an important role in building the culture, values and attitudes of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish ways of working within team | <ul style="list-style-type: none">1.1 Identify relevant team members and communicate ways of working objectives, expectations and desired outcomes1.2 Identify and establish strategies to monitor and evaluate performance and sustainability of key systems and processes1.3 Consult and seek advice from stakeholders, to identify opportunities for improvement1.4 Communicate with and mentor team members on ways of working that contribute to continuous improvement1.5 Communicate with and coach team members how they can be innovative |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| 2. Identify improvements | 2.1 Analyse performance reports and variance from organisational plans within workplace 2.2 Identify and analyse changing trends and opportunities relevant to the workplace 2.3 Collect data and analyse areas for improvement in supply chains, and operational and service systems 2.4 Conduct a gap analysis of supply chains, and operational and service systems and identify improvement needs and opportunities 2.5 Communicate with and agree on team members identified improvement needs and opportunities 2.6 Identify learning opportunities for team members |
| 3. Implement innovative processes | 3.1 Confirm objectives, timeframes, measures and communication plans are in place to manage implementation 3.2 Address the impact of change and consequences for people and implement transition plans 3.3 Implement contingency plans in the event of non-performance 3.4 Follow up failure by investigation and analysis of causes and manage emerging challenges and opportunities 3.5 Confirm that learnings from activities are captured and managed using relevant knowledge management system |
| 4. Develop workplace culture and tools for continuous improvement, innovation and learning | 4.1 Evaluate continuous improvement systems and processes and innovation on a regular basis 4.2 Identify and communicate with stakeholders costs and benefits of innovations and improvements 4.3 Establish rewards for continuous improvement, innovation and learning 4.4 Seek and respond to feedback from relevant stakeholders' systems and processes for continuous improvement, innovation and learning |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|--|
| Reading | <ul style="list-style-type: none"> Analyses, evaluates and integrates facts and ideas to construct meaning from a range of text types |

| SKILL | DESCRIPTION |
|---------------------------|--|
| Writing | <ul style="list-style-type: none"> Integrates information and ideas from a range of sources, utilising appropriate support materials Communicates complex relationships between ideas and information, matching style of writing to purpose and audience |
| Numeracy | <ul style="list-style-type: none"> Selects and interprets mathematical information to analyse performance Performs calculations required to establish timeframes, cost-benefits and measures for continuous improvement and innovation processes |
| Initiative and enterprise | <ul style="list-style-type: none"> Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of the work environment Recognises the importance of taking audience, purpose and contextual factors into account when making decisions about what to communicate, with whom, why and how |
| Self-management | <ul style="list-style-type: none"> Plans and implements strategies to review and improve own performance |
| Teamwork | <ul style="list-style-type: none"> Recognises the importance of building rapport to establish positive and effective working relationships Collaborates with others to achieve joint outcomes, playing an active role in encouraging innovation and facilitating effective group interaction |
| Problem solving | <ul style="list-style-type: none"> Applies problem-solving processes to identify risks, evaluate options and determine solutions Uses lateral and analytical thinking to evaluate options against needs, resources and constraints before making decisions Actively identifies systems, devices and applications with potential to meet current and or future needs |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises, implements or reviews organisational strategies, systems and processes |
| Initiative and enterprise | <ul style="list-style-type: none"> Recognises that the current way is only one way of doing something and explores possibilities that challenge current approaches Facilitates a climate in which creativity and innovation are accepted as an integral part of achieving outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT608 Manage innovation and continuous improvement.

Supersedes but is not equivalent to BSBMGT619 Identify and implement business innovation.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBS*TR601 Manage innovation and continuous improvement

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage and promote innovation and continuous improvement for an organisation or work area on at least one occasion.

In the course of the above, the candidate must:

- identify opportunities for improvement
- consult with stakeholders
- promote the value of creativity, innovation and sustainability and recognising successes
- support testing and trialling of new ideas
- undertake risk management and cost-benefit analysis for options
- plan for and implement improvements using organisation's processes for approvals, project management and change management
- facilitate contributions to and communications about continuous improvement and innovation
- capture insights, experiences and ideas for improvements and incorporate them into the organisation's knowledge management systems and future planning.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- cost-benefit analysis methods
- knowledge management systems
- continuous improvement systems and processes
- creativity and innovation theories and concepts
- organisational learning principles
- quality management and continuous improvement theories
- relevant risk management concepts

- key aspects of supply chains, and operational, product and service systems
- method for conducting gap analysis
- changing trends and opportunities in workplace.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR602 Develop organisational strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish the strategic direction of the organisation, sustain competitive advantage and enhance competitiveness. It covers analysis and interpretation of relevant markets, capability assessment of the organisation and analysis of the organisation's existing and potential competitors and allies. It also covers implementing the strategic plan and developing specific actions and initiatives that will be undertaken by people working in various roles.

The unit applies to individuals working in senior roles in the organisation who have responsibility for ensuring that the organisation is positioned to ensure its long-term viability and success.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Confirm vision and mission of the organisation | 1.1 Identify organisation's strategic direction, vision and mission 1.2 Consult with relevant stakeholders on required changes to vision and mission 1.3 Review and develop or revise organisational values to support the vision and mission statement 1.4 Seek support for strategic planning process from all relevant stakeholders |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2. Analyse internal and external environment | 2.1 Analyse and undertake research to understand external environment 2.2 Undertake political, economic, social, and technological (PEST) analysis 2.3 Undertake capability assessment of competitor organisations 2.4 Analyse organisation's strengths, weaknesses, opportunities and threats (SWOT) 2.5 Establish cooperative ventures, that are supported by risk and cost benefit analyses, according to organisational vision, mission and values and provide for due diligence, where required 2.6 Seek and respond to feedback from relevant stakeholders on analysis internal and external environments |
| 3. Develop strategic organisational plan | 3.1 Document relevant research and background for inclusion in the strategic plan 3.2 Develop objectives and strategies relevant for the future 3.3 Detail each strategy with a priority, a timeframe, responsible stakeholders and measurable performance indicators 3.4 Identify risks and develop a risk management plan 3.5 Circulate strategic plan and risk management plan for feedback and endorsement |
| 4. Implement strategic organisational plan | 4.1 Communicate strategic plan to all relevant stakeholders 4.2 Develop actions and initiatives for team members to undertake 4.3 Assign team members' roles in relation to strategic objectives 4.4 Use performance indicators to monitor progress in implementing plan and make refinements to plan 4.5 Evaluate achievement of objectives at agreed milestones with relevant stakeholders 4.6 Review effectiveness of plan and consider methods for improving strategic planning processes |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Identifies and analyses complex organisational texts to determine business requirements |

| SKILL | DESCRIPTION |
|---------------------------|--|
| | <ul style="list-style-type: none"> Reviews, evaluates, interprets and applies content from a range of sources to aid in development of strategies |
| Writing | <ul style="list-style-type: none"> Prepares strategic plans for relevant stakeholders incorporating appropriate vocabulary, grammatical structure and conventions Incorporates amendments to documents according to organisational requirements Collates and compiles data to convey specific information, requirements and recommendations |
| Oral communication | <ul style="list-style-type: none"> Presents information and seeks advice using language and register appropriate to audience Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets and analyses data and information to identify trends and to estimate resource implications of proposed strategies |
| Self-management | <ul style="list-style-type: none"> Works autonomously making high level decisions to achieve and improve organisational goals Seeks feedback or expert advice, where required |
| Initiative and enterprise | <ul style="list-style-type: none"> Takes a lead role in the development of strategies to achieve organisational goals Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information |
| Planning and organising | <ul style="list-style-type: none"> Develops flexible plans for complex, high impact activities with strategic implications, taking into account capabilities, efficiencies and effectiveness |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role |
| Problem solving | <ul style="list-style-type: none"> Applies problem solving processes to identify risks, evaluate options and determine solutions Evaluates outcomes to identify opportunities for improvement Systematically gathers and analyses all relevant information and evaluates options to inform decisions about organisational strategies |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT616 Develop and implement strategic plans.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSTR602 Develop organisational strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- consult and communicate with relevant stakeholders, and develop and implement one strategic plan for an organisation on at least one occasion, including:
 - revising mission, vision and values
 - analysing and validating findings of research and analysis
 - obtaining input to and endorsement of strategic plans
 - brief relevant parties about strategic plan.

In the course of the above, the candidate must:

- analyse organisation's internal and external environment to formulate strategic plans, including:
 - background and research relevant to strategic plan
 - legislation, regulations and codes of practice, including for intellectual property
 - objectives, strategies and priorities
 - roles and responsibilities
 - performance indicators
 - timeframes
 - cost-benefit and risk analysis
- seek advice from appropriate experts
- monitor and evaluate the implementation of strategic plan and make refinements
- review effectiveness of planning processes and identify opportunities for improvement.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, regulations and codes of practice relevant to organisation's strategic plan

- organisation's strategic direction, vision and mission
- methods for conducting capability assessment
- organisation's strengths, weaknesses, opportunities and threats
- strengths and weaknesses of existing and potential competitors
- key features of cooperative ventures
- methods for conducting cost benefit analysis
- key features of due diligence processes
- risks and risk management strategies relevant to strategic planning, including:
 - intellectual property rights and responsibilities
 - other risks
- strategic planning methodologies, including:
 - political, economic, social and technological (PEST) analysis
 - strengths, weaknesses, opportunities and threats analysis (SWOT)
- internal and external sources of information relevant to the organisation's market, competitors, customer base, vision, values and capabilities
- techniques for developing organisational values.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation, regulations, standards and codes
- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR603 Develop business continuity plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to work within the business continuity framework to develop and implement business continuity plans for an organisation to manage risk and ensure business resilience when faced with a disruptive event. This unit addresses the knowledge and processes necessary to develop and maintain business continuity requirements.

The focus is on risk and vulnerability assessment, business impact assessments, and business continuity and communication plans.

The unit applies to individuals working in positions of authority who are approved to implement change across the division, business area, program area or project area.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify scope, key business areas and critical functions | 1.1 Identify organisational expectation, objectives, and policies and procedures 1.2 Identify resources required and relevant stakeholders 1.3 Identify and analyse sources of disruption to the organisation's priorities, operations and environment 1.4 Identify organisation's emergency response, continuity and recovery strategies |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 1.5 Determine organisation's critical business functions, its dependencies and interdependencies, and risk and disruption scenarios |
| 2. Establish documents required to create business continuity plan | 2.1 Develop business continuity management framework 2.2 Analyse and evaluate risks associated with business continuity management framework 2.3 Report associated risks to and seek feedback from relevant stakeholders on business continuity management framework 2.4 Conduct business impact assessment of implementation of business continuity framework 2.5 Analyse and validate outcomes of business impact assessment and feedback 2.6 Report outcomes to and seek feedback from relevant stakeholders on business impact assessment 2.7 Develop and implement risk treatments strategies and plan 2.8 Seek feedback from relevant stakeholders on and review risk treatments strategies and plan |
| 3. Create business continuity plan | 3.1 Determine if disaster recovery plan exists 3.2 Consult and develop with relevant stakeholders disaster recovery plan, where required 3.3 Consult and develop with relevant stakeholders business continuity plan according to regulations, standards, industry practice and geographical dispersion, where required 3.4 Seek, document and analyse feedback received and finalise business continuity plan 3.5 Provide relevant staff with required information on business continuity plan 3.6 Assign relevant staff actions to implement business continuity plan 3.7 Establish communication plan to report and escalate processes 3.8 Manage and record staff learning and development, management, and implementation of business continuity plan on organisation's knowledge management system |
| 4. Evaluate business continuity plan | 4.1 Report outcomes and seek feedback from relevant stakeholders on business continuity plan 4.2 Report to relevant stakeholders outcomes of staff learning and development, and business continuity framework exercises 4.3 Assess gaps for improvement 4.4 Make changes to business continuity plan according to feedback received and identified gaps |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">• Interprets organisation's reports, policies and procedures to develop business continuity management plan |
| Writing | <ul style="list-style-type: none">• Develops detailed workplace documentation clarifying complex ideas using relevant language and structure according to context and audience |
| Oral communication | <ul style="list-style-type: none">• Uses clear language, required tone and syntax to address key stakeholders and disseminate information• Informs staff about processes and outcomes of business continuity management plans and outcomes of staff learning and development and other reviews |
| Numeracy | <ul style="list-style-type: none">• Analyses and interprets numerical information to assist in undertaking detailed business impact assessment activities across the spectrum of the organisation's stakeholders |
| Self-management | <ul style="list-style-type: none">• Takes responsibility and ownership of own work and is autonomous• Recognises and manages factors that may affect achievement of outcomes• Recognises the critical importance of clarifying, focusing and aligning goals and expectations and may use the process to build ownership of and broad commitment to achieving outcomes• Uses formal decision-making processes as scaffolding for thinking, seeking input, advice, feedback and specialist advice, as required |
| Initiative and enterprise | <ul style="list-style-type: none">• Tailors every communication to achieve its purpose, demonstrating a sophisticated understanding of the needs, interests, issues and priorities of each audience• Invests time and energy in building rapport with others as an integral part of all work-based interactions• Monitors adherence to wide-ranging organisational policies and procedures• Uses active listening, observational and questioning techniques to identify different perspectives and confirm, clarify and revise understanding |
| Problem solving | <ul style="list-style-type: none">• Recognises and addresses complex problems involving multiple variables• Draws on a broad understanding of context and uses a combination of analysis and intuition to decide whether an idea is worth developing and implementing |

Unit Mapping Information

No equivalent unit. Supersedes and is not equivalent to BSBCON601 Develop and maintain business continuity plans.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSTR603 Develop business continuity plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement a business continuity plan for an organisation or work area on at least one occasion, including:
 - developing business continuity management framework
 - developing business impact assessment
 - developing risk treatments strategies and plan
 - developing new or updating existing disaster recovery plan
 - coordinating organisation's emergency response, continuity and recovery strategies
 - managing and recording staff learning and develop on organisation's knowledge management system.

In the course of the above, the candidate must:

- communicate effectively with stakeholders to promote an understanding of business continuity frameworks.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- policies and procedures impacting business continuity, including business continuity strategies
- overall operations of the organisation, including:
 - existing data and information systems
 - paper and digital recordkeeping systems
- organisation's resources
- critical business functions, including:
 - dependencies and interdependencies

- risk and disruption scenarios
- methods for developing business continuity management framework
- methods for conducting business impact assessment
- key elements of business continuity plan
- regulations, standards, industry practice and geographical dispersion
- key elements of risk treatments strategies and plan
- key elements of disaster recovery plan
- organisation's emergency response, continuity and recovery strategies
- key features of organisation's knowledge management system
- past and current internal, external and industry disruptions.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant policies and procedures, legislation, regulations, standards and codes of practice
- workplace documentation and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR801 Lead innovative thinking and practice

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to generate, lead and sustain innovative organisational thinking and practice.

The unit applies to individuals who initiate and lead innovation in any industry or community context. Each organisation's thinking and practice will be different depending on its core business, purpose, size, complexity and broader operating context.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Generate innovative thinking and creativity | 1.1 Identify and analyse trends shaping organisation's current and future thinking and practice 1.2 Identify and use techniques and tools to generate ideas and facilitate thinking 1.3 Introduce and promote creative thinking techniques 1.4 Research and analyse relevant conditions for innovation and issues that impact innovative thinking and creativity 1.5 Research and review innovation drivers and enablers |
| 2. Lead innovative practices | 2.1 Assess personal leadership style to confirm it models positive innovative thinking and practice |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.2 Review and refine practice that models and supports innovation 2.3 Determine and assess the requirements to promote sustainable innovative activities 2.4 Construct and implement methods to promote knowledge transfer with relevant stakeholders 2.5 Identify, evaluate and manage risks associated with innovation |
| 3. Support a culture of innovation | 3.1 Identify, introduce and promote innovative practices, processes, products and/or services according to audience and organisational requirements 3.2 Establish ways to capture, communicate and share innovative ideas and practices 3.3 Confirm team approaches foster communication, consultation and team development for innovation 3.4 Identify, assess and provide relevant resources for innovation processes 3.5 Develop and apply strategies to foster a workplace culture that encourages innovation 3.6 Establish systems and processes that support innovation |
| 4. Sustain innovative thinking and practice | 4.1 Develop strategies where innovation is an integral part of organisational activity 4.2 Develop and monitor processes that confirm ongoing awareness of individual and collective contributions to innovative thinking and practice 4.3 Identify and analyse potential barriers and risks to innovation and devise strategies to respond 4.4 Analyse and reflect on innovation performance as a basis for developing strategies for improvement 4.5 Seek feedback from relevant stakeholders 4.6 Make changes to innovative thinking and practices according to feedback received |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Identifies, analyses, interprets and evaluates visual and textual information from a range of sources to identify innovation strategies, practices and trends |

| SKILL | DESCRIPTION |
|---------------------------|--|
| Writing | <ul style="list-style-type: none"> • Uses clear and precise language to document research findings for reference purposes • Develops complex plans, strategies and systems to integrate innovation into the organisation using appropriate formats for the audience and purpose |
| Initiative and enterprise | <ul style="list-style-type: none"> • Discusses, presents and seeks information using appropriate structure and language for the particular audience • Uses questioning and active listening to encourage discussion and to clarify or confirm understanding • Plans, develops, implements and monitors practical strategies to introduce and support innovation in the workplace • Develops new and innovative ideas through exploration, evaluation, analysis and critical thinking |
| Numeracy | <ul style="list-style-type: none"> • Interprets, analyses and presents numeric/financial information in complex documents |
| Self-management | <ul style="list-style-type: none"> • Leads in the development of strategies to integrate innovative practices into the organisation • Evaluates and reflects on personal effectiveness to develop strategies to enhance own performance |
| Teamwork | <ul style="list-style-type: none"> • Understands how own role links in with others and contributes to broader work goals • Uses a variety of relevant communication tools and strategies to build and maintain effective working relationships • Uses inclusive and collaborative techniques to communicate, negotiate and consult effectively with a range of stakeholders • Actively seeks the perspectives of others as part of work role |
| Problem solving | <ul style="list-style-type: none"> • Leads in the development of strategies to integrate innovative practices into the organisation • Uses formal analytical and lateral thinking techniques to identify issues, generate and evaluate possible solutions, and select most appropriate option |

Unit Mapping Information

Supersedes and is equivalent to BSBINN801 Lead innovative thinking and practice.

Supersedes but is not equivalent to BSBMGT802 Lead design and review of enterprise systems.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSTR801 Lead innovative thinking and practice

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead at least one innovative thinking and practices for an organisation or work area.

In the course of the above, the candidate must:

- research, review and analyse trends in thinking and emerging practices as they relate to an organisation's current thinking and practices
- develop capacity to lead innovative thinking and practice in an organisational context.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- current and past theories and thinking about innovation
- creative thinking techniques
- personal leadership style
- methods to promote knowledge transfer and sustainable innovative activities
- innovative practices, processes, products and services
- strategies to foster workplace culture of innovation
- systems and processes that support innovation
- barriers and risks to innovation
- internal and external factors that impact innovation
- strategies for identifying, assessing and managing risks associated with innovation.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR802 Lead strategic planning processes for an organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead the development of high-level strategic plans that serve the vision and mission of an organisation. It addresses analysing the environment, identifying risks and opportunities, planning staffing requirements, succession planning, and establishing and monitoring financial and non-financial performance indicators. Leadership skills are applied in order to engage people with the organisation's vision and goals and in developing and implementing the plan.

The unit applies to senior managers and business owners who use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, in order to generate ideas and provide solutions to complex problems. They use communication skills to demonstrate their understanding of theoretical concepts and to transfer knowledge and ideas to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Analyse environment | 1.1 Identify organisational vision, mission and values 1.2 Identify, gather and analyse relevant organisational data according to organisational policies and procedures 1.3 Identify stakeholders and resources required to develop and review strategic plan |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>1.4 Conduct strengths, weaknesses, opportunities and threats (SWOT) analysis and determine and define strengths, weaknesses, opportunities and threats</p> <p>1.5 Review current strategic plan and identify gaps, and improvement needs and opportunities</p> <p>1.6 Conduct political, economic, social and technological (PEST) analysis and identify opportunities and threats due to political, economic, social and technological forces</p> <p>1.7 Research global environment and market, and identify trends, best practice, risks and opportunities</p> <p>1.8 Assess organisational and global markets' current and future demands</p> <p>1.9 Identify barriers to organisational goals and consult with relevant stakeholders to determine strategies to overcome barriers</p> |
| 2. Determine direction of strategic plan | <p>2.1 Establish communication processes that inform and support relevant team members</p> <p>2.2 Consult with relevant stakeholders to determine parameters for planning process</p> <p>2.3 Assign actions to relevant staff for developing planning process and direction of strategic plan</p> <p>2.4 Develop planning process and direction of strategic plan</p> <p>2.5 Establish organisational goals and priorities</p> <p>2.6 Determine financial forecast and budgets</p> <p>2.7 Seek feedback from stakeholders on direction of strategic plan and established organisational goals and priorities</p> <p>2.8 Develop strategy map and identify gaps for improvement in direction of strategic plan</p> <p>2.9 Make changes according to feedback received and identified improvements</p> |
| 3. Develop and execute strategic plan | <p>3.1 Determine and set key performance indicators, budget and timeline</p> <p>3.2 Develop annual operational plan to facilitate implementation of long-term strategic plan</p> <p>3.3 Plan human resource development and succession strategies that confirm long-term business viability</p> <p>3.4 Initiate strategies to skill own workforce to implement the strategic plan</p> <p>3.5 Present recommendations to key stakeholders for feedback and make changes to strategic plan according to feedback received</p> <p>3.6 Communicate with stakeholders and assign responsibilities</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|--|
| | 3.7 Assist stakeholders to implement strategies |
| 4. Monitor and review strategic plan | 4.1 Develop knowledge management systems to capture team progress, insights, experiences and learnings 4.2 Monitor financial and non-financial performance indicators 4.3 Monitor progress against timeline and key performance indicators 4.4 Identify progress that has not been made according to timeline and key performance indicators and communicate with relevant stakeholders to identify required actions 4.5 Seek feedback from relevant stakeholders on strategies and document feedback received for future development of strategic plans |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none"> Sources, evaluates and critiques ideas and information from a range of complex texts to assist with strategic decisions Reviews texts to determine whether required outcomes have been met |
| Writing | <ul style="list-style-type: none"> Develops or reviews complex texts according to organisational requirements to convey strategy, context and intent |
| Oral communication | <ul style="list-style-type: none"> Leads discussions using active listening and questioning to seek the views and opinions of others |
| Numeracy | <ul style="list-style-type: none"> Develops budgets and plans using mathematical processes to calculate costs, timeframes and resources |
| Problem solving | <ul style="list-style-type: none"> Develops and implements strategies to ensure organisational goals are achieved Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals Systematically gathers and analyses all relevant information and evaluates options in order to inform strategic decisions or solve problems |
| Planning and organising | <ul style="list-style-type: none"> Leads planning processes according to organisational goals |

| SKILL | DESCRIPTION |
|---------------------------|--|
| Initiative and enterprise | <ul style="list-style-type: none">Monitors results against stated goals, adjusting plans and resources where necessary |
| Teamwork | <ul style="list-style-type: none">Plays a lead role in situations requiring effective collaboration, demonstrating high-level influencing skills, focusing and shaping awareness, and engaging and motivating others |
| Self-management | <ul style="list-style-type: none">Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBDIV803 Develop cross cultural communication and negotiation strategies
- BSBLDR802 Lead the strategic planning process for an organisation.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBS TR802 Lead strategic planning processes for an organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- facilitate planning processes to develop at least one organisation-wide strategic plan.

In the course of the above, the candidate must:

- consult with relevant stakeholders
- plan and budget for human, financial and capital resources and implement staff development and succession plans
- identify and analyse information about the organisation and its environment, including:
 - research about industry trends and practices
 - environmental and organisational scan
 - existing organisational strategic planning
 - barriers to achieving the organisational goals
- align the strategic plan to the vision, mission and key goals of the organisation
- identify key performance indicators
- implement and evaluate strategic plan, including:
 - developing tactical and operational annual plans
 - refining the plan to respond to changed conditions.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- contractual requirements and implications for the business
- financial management requirements and processes of the business
- industry trends and practices of relevance to the organisation's strategic direction
- risk management processes
- methods for conducting SWOT analysis

- methods for conducting PEST analysis
- strategic and operational planning processes
- global environment and market, including:
 - trends
 - best practice
 - risks
 - opportunities
- current and future demands of organisation and global markets
- barriers to achieving goals
- communication processes
- methods to develop strategic plan
- strategy map
- key features of knowledge management systems
- key performance indicators, including financial and non-financial
- key features of annual operational plan.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational and industry information and data relevant to performance evidence
- workplace documents relevant to performance evidence, including strategic planning documentation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSTR803 Establish business continuity management strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes skills and knowledge required to establish, monitor and review the business continuity management framework and strategies for an organisation.

The unit applies to individuals working in positions of authority who have the responsibility for embedding business continuity management into corporate or organisational levels of a business.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Critical Thinking and Problem Solving – Business Strategy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Create business continuity management framework | 1.1 Identify organisational scope, critical business operations and resources, and risks and disruption scenarios 1.2 Develop risk management strategy 1.3 Conduct a business impact analysis 1.4 Develop business continuity management framework according to identified potential risks and interruption to critical business operations 1.5 Demonstrate sponsorship, responsibility and accountability for business continuity management framework 1.6 Consult with stakeholders to establish governance structures for the business continuity management framework, according to |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | <p>size of organisation</p> <p>1.7 Determine and seek approval from relevant stakeholders on resources for implementation of business continuity management framework</p> <p>1.8 Support stakeholders to implement business continuity management framework</p> |
| 2. Monitor business continuity management framework and strategies | <p>2.1 Develop a cyclical review process for monitoring business continuity management framework</p> <p>2.2 Communicate and provide to relevant stakeholders information relating to cyclical review process</p> <p>2.3 Develop and seek approval of tools that verify and validate business continuity management framework activities, processes and plans</p> <p>2.4 Consult with relevant stakeholders implementation of business continuity management framework</p> <p>2.5 Manage business continuity management framework learning, development and exercises across organisation</p> <p>2.6 Implement and conduct business continuity management program audits</p> |
| 3. Review and evaluate business continuity management framework and strategies | <p>3.1 Review and analyse reports on business continuity management framework learning and development exercises</p> <p>3.2 Review and analyse the organisation's communication strategy and implement relevant changes</p> <p>3.3 Review and update overall business continuity management framework activities, processes, plans and resources according to results pre- and post-activation</p> <p>3.4 Analyse and integrate organisation's business impact assessment and identify dependencies and interdependencies, as required</p> <p>3.5 Seek feedback from and respond to relevant stakeholders on business continuity management framework and strategies</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses a vast range of textual information to review organisational agendas and policies |

| SKILL | DESCRIPTION |
|---------------------------|---|
| Writing | <ul style="list-style-type: none">Develops detailed workplace documentation clarifying complex ideas using relevant language and structure according to context and audience |
| Oral communication | <ul style="list-style-type: none">Uses clear language, appropriate tone and syntax to address key stakeholders and disseminate information |
| Numeracy | <ul style="list-style-type: none">Analyses numerical information to determine budgetary requirements |
| Self-management | <ul style="list-style-type: none">Takes responsibility and ownership of own work, intuitively recognising and managing factors that may affect achievement of outcomesRecognises, understands and applies organisational requirements in undertaking own tasks and achieving expectationsRecognises the critical importance of clarifying, focusing and aligning goals and expectations to achieve outcomes |
| Teamwork | <ul style="list-style-type: none">Pays close attention to the ways information is communicated, recognising ways they may influence interpretation of a message and appreciating the subtletiesActively builds formal and informal networks to include key people with expert skills, knowledge, connections and decision-making power |
| Problem solving | <ul style="list-style-type: none">Uses formal decision making processes as scaffolding for thinking, seeking input, advice, feedback and specialist advice, as requiredUses experience, analysis and intuition to decide whether an idea is worth developing and implementing |
| Initiative and enterprise | <ul style="list-style-type: none">Uses active listening, observational and questioning techniques to identify different perspectives and confirm, clarify or revise understanding |

Unit Mapping Information

Supersedes and is equivalent to BSBCON801 Establish and review the business continuity management framework and strategies.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBS*TR803 Establish business continuity management strategies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- establish, monitor and review the formal and informal business continuity management framework and strategies for an organisation or work area, including:
 - consulting with relevant stakeholders to establish and implement a business continuity framework and system
 - developing and implementing a process to review a business continuity management framework in consultation with others
 - analysing, evaluating and updating a business continuity management framework
 - demonstrating leadership and authority for embedding business continuity management into corporate and organisational levels of a business.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- risk management strategy
- business impact analysis
- potential risks and interruption to critical business operations
- governance structures
- cyclical review process
- tools that verify and validate business continuity management framework activities, processes and plans
- internal and external dependencies and interdependencies
- current organisation functions, including existing data and information systems
- organisational policies and procedures relevant to the business continuity management framework
- internal, external and industry disruptions

- relationship of the business continuity management framework to other business processes.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents, including risk management documentation
- organisational and industry information and data
- organisational policies and procedures
- workplace equipment and materials.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSUS211 Participate in sustainable work practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to measure, support and find opportunities to improve the sustainability of work practices.

The unit applies to individuals, working under supervision or guidance, who are required to follow workplace procedures and instructions. These individuals work in an environmentally sustainable manner within scope of competency, authority and own level of responsibility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Sustainability

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Measure sustainable work practices | 1.1 Identify sustainable work practices in own work role 1.2 Measure current usage of resources in own work role 1.3 Record and file resource usage documents 1.4 Identify resource inefficiencies from gathered information |
| 2. Support sustainable work practices | 2.1 Identify and comply with workplace sustainability procedures 2.2 Identify workplace environmental hazards according to environmental regulations and standards 2.3 Report any breaches and potential breaches to organisational personnel |
| 3. Seek opportunities to | 3.1 Identify areas of improvement to work practices in own work |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|--|
| improve sustainable work practices | area 3.2 Consult with colleagues and management to assess potential to improve sustainability of identified work practices 3.3 Make suggestions for improvements to workplace practices in own work area |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Calculates basic metric measurements to determine resource usage |
| Reading | <ul style="list-style-type: none"> Recognises and interprets textual information to establish job requirements |
| Writing | <ul style="list-style-type: none"> Completes documents using required formats |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with co-workers in range of work contexts Collaborates and cooperates with others to achieve joint outcomes |
| Initiative and enterprise | <ul style="list-style-type: none"> Implements actions according to requirements, taking some responsibility for sequencing and timing of tasks Analyses current practices to identify opportunities for improvement |
| Self-management | <ul style="list-style-type: none"> Understands and adheres to legal and regulatory responsibilities related to own work |
| Technology | <ul style="list-style-type: none"> Uses main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBSUS201 Participate in environmentally sustainable work practices.

Links

Companion Volume Implementation Guide is found on VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSUS211 Participate in sustainable work practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- participate in at least three sustainable work practices.

In the course of the above, the candidate must:

- identify benefits of sustainable work practices and areas of improvement for sustainable practices in the workplace
- identify and apply sustainability legislation and organisational sustainability policies and procedures
- participate in and support discussions for improved resource efficiency processes
- identify, measure and document usage of resources
- collaborate with team members to develop suggestions for improving workplace sustainability practices.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- environmental and resource hazards and risks
- Australian and international standards for corporate social sustainability
- sustainability regulations and codes of practice applicable to own role
- organisational sustainability policies and procedures
- reporting channels and procedures to report breaches and potential issues
- advantages of sustainable practices in the workplace.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- documentation, information and resources on workplace environmental and resource efficiency
- sustainability legislation, regulations and standards.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSUS411 Implement and monitor environmentally sustainable work practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to analyse and implement improvements to the environmental sustainability of work practices and monitor their effectiveness.

The unit applies to individuals with responsibility for the practices of a specific work area or who lead a work group or team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Sustainability

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish sustainable work contexts | 1.1 Identify and assess organisational compliance against environmental legislation, regulations and standards 1.2 Collect data on environmental efficiency in organisational systems and processes 1.3 Analyse data on environmental efficiency and current purchasing strategies and identify areas for improvement 1.4 Consult stakeholders and external data sources on sustainability best practice 1.5 Develop efficiency targets and methods to monitor outcomes |
| 2. Implement sustainable | 2.1 Identify and source tools to set efficiency targets |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| work practices | 2.2 Implement and integrate efficiency targets with other operational activities 2.3 Support team members to identify possible areas for improved resource efficiency in work areas 2.4 Seek and act on feedback from stakeholders on implementation |
| 3. Monitor performance of sustainable work practices | 3.1 Assess outcomes using monitoring method developed 3.2 Document and communicate outcomes to key personnel and stakeholders 3.3 Identify changes required to targets and tools from strategies and improvement plans 3.4 Promote successful strategies in development of new efficiency targets |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Numeracy | <ul style="list-style-type: none"> Analyses numerical information to measure usage and calculates metric measurements, quantities and ratios and financial data using appropriate tools |
| Oral communication | <ul style="list-style-type: none"> Presents information and seeks advice using structure and language appropriate to audience Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Reading | <ul style="list-style-type: none"> Identifies and analyses texts to determine legislative and regulatory requirements relevant to work area Reviews reported information to evaluate workplace strategies and improvement practices |
| Writing | <ul style="list-style-type: none"> Documents findings of investigations from written and oral sources according to organisational requirements Provides updates about progress using formats and language appropriate to the audience and context |
| Initiative and Enterprise | <ul style="list-style-type: none"> Identifies and follows legislative requirements and organisational policies and procedures associated with own role |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information |

| Skill | Description |
|-------------------------|--|
| | <ul style="list-style-type: none"> Collaborates and consults with a range of stakeholders to achieve shared understanding of individual roles in meeting objectives |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage routine and non-routine tasks for own work group with an awareness of how they contribute to the broader organisation Uses systematic, analytical processes to set environmental targets, gather relevant information, identify and evaluate alternative approaches Evaluates outcomes of decisions to identify opportunities for improvement |
| Technology | <ul style="list-style-type: none"> Uses the main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBSUS401 Implement and monitor environmentally sustainable work practices.

Supersedes but is not equivalent to:

- BSBSUS402 Implement an environmental management plan
- BSBSUS403 Measure, monitor and reduce carbon emissions
- BSBSUS404 Assess, implement, monitor and report on waste management
- BSBSUS405 Assess, monitor and reduce water use
- BSBSUS406 Identify and apply sustainability rating tools.

Links

Companion Volume Implementation Guide is found on VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSUS411 Implement and monitor environmentally sustainable work practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement and monitor at least three environmentally sustainable work practices.

In the course of the above, the candidate must:

- identify current procedures, practices and compliance requirements in relation to environmental and resource sustainability in the workplace
- engage and consult with relevant stakeholders to develop and implement sustainability improvements, encourage feedback and to report on outcomes
- plan and organise work group activities to:
 - measure current resource usage
 - evaluate alternative solutions to workplace environmental issues
 - resolve workplace sustainability issues and generate ideas for improvements
 - evaluate and implement strategies to improve resource usage
 - comply with environmental requirements
- apply continuous improvement approaches to enhance organisation's sustainability performance
- apply change management techniques to support sustainability performance.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- compliance requirements for the work area with reference to legislation, regulations, codes of practice and workplace procedures that relate to environmental and sustainability issues
- relevant internal and external sources of information for the development of efficiency targets
- benchmarks for environmental and resource sustainability relevant to organisation

- Australian and international standards for corporate social sustainability
- continuous improvement approaches for workplace practices
- resources for monitoring sustainable work practices including:
 - questionnaires and surveys
 - visual calculations
 - supply records and invoices
 - previous internal and external audit documents
- organisational systems and procedures that relate to environmental and resource sustainability improvements, including:
 - supply chain, procurement and costing strategies
 - quality assurance
 - recommendation development and seeking approvals
 - sales strategies and operations.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- environmental sustainability legislation, regulations, standards and codes
- workplace reference materials for environmental sustainability and practices.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSUS412 Develop and implement workplace sustainability plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to prepare, implement and monitor sustainability plans for the workplace.

The unit applies to individuals who lead a work group or have responsibility over a specific workplace area. These individuals work in a sustainable manner within their scope of competency, authority and own level of responsibility.

'Sustainability' in this unit refers to a broad approach that focuses on the minimisation of an organisation's social, economic and environmental impact, as well as proactive value creation in these areas.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Sustainability

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare sustainability plans | 1.1 Identify workplace sustainability issues and feasibility of addressing identified issues with a sustainability plan 1.2 Research environmental legislation, regulations and policies for application in sustainability plan 1.3 Consult relevant stakeholders for information on identified workplace sustainability issues 1.4 Identify and document indicators for measuring sustainability |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|---|
| | plan outcomes 1.5 Create sustainability plans |
| 2. Implement sustainability plans | 2.1 Identify resources required to implement sustainability plan 2.2 Source required resources 2.3 Delegate and supervise work team in implementation of sustainability plans 2.4 Communicate sustainability changes to workplace according to organisational procedures |
| 3. Monitor sustainability plans | 3.1 Assess effectiveness of sustainability plan against indicators 3.2 Identify and evaluate successful and unsuccessful features of sustainability plan 3.3 Document evaluation of sustainability plan 3.4 Make amendments to improve future operation of sustainability plan |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Analyses numerical information to measure usage and calculates metric measurements, quantities and ratios and financial data using appropriate tools |
| Oral communication | <ul style="list-style-type: none"> Presents information and seeks advice using structure and language appropriate to audience Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Reading | <ul style="list-style-type: none"> Identifies and analyses complex texts to determine legislative, regulatory and business requirements Reviews reported information to evaluate workplace strategies and improvement practices |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information Collaborates and consults with a range of stakeholders to achieve shared understanding of individual roles in meeting objectives |
| Initiative and enterprise | <ul style="list-style-type: none"> Develops plans to manage routine and non-routine tasks for own work group with an awareness of how they contribute to the |

| Skill | Description |
|-------------------------|--|
| | <p>broader organisation</p> <ul style="list-style-type: none">• Uses systematic, analytical processes to set environmental targets, gather relevant information, identify and evaluate alternative opportunities for improvement• Uses the main features and functions of digital tools to complete work tasks and access information |
| Planning and organising | <ul style="list-style-type: none">• Follows legislative requirements and organisational policies and procedures associated with own role |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSUS412 Develop and implement workplace sustainability plans

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify sustainability issues and opportunities for improvement in at least two sustainable practices in the work area
- prepare, implement and monitor at least one sustainability plan for identified issues addressing at least three different workplace sustainability issues.

In course of the above the candidate must:

- research legislative requirements and applicable frameworks
- engage stakeholders to identify requirements and content of sustainability plan
- create implementation processes which identify resource requirements
- develop communication plan to convey workplace sustainability changes to relevant stakeholders
- source resources and support work team in implementation of sustainability plan
- monitor effectiveness of sustainability plan against indicators including through use of software.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- content of sustainability plans including:
 - environmental legislation, regulations and policies
 - environmental and resource impacts
 - key stakeholders
 - resource requirements
 - community impact and engagement
 - risks and barriers

- strategies
- action plan
- specific, measurable, actionable, realistic and time-specified indicators to assess effectiveness of sustainability plans
- applicable external assistance and programs, including software programs, to assist in implementation of sustainability plans
- communication plan methods including:
 - meetings
 - training sessions
 - posters and signage.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access:

- sustainability legislation, regulations, standards and codes
- workplace reference materials on sustainability work practices.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSUS413 Evaluate and report on workplace sustainability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to identify sustainable work practices, assess operation of sustainable practices against indicators and improvements and create reports detailing the assessment of workplace sustainability practices.

The unit applies to individuals with responsibility for a specific area of work or who lead a work group or team. These individuals examine processes to identify sustainable work practices and assess them against international sustainability frameworks.

'Sustainability' in this unit refers to a broad approach that focuses on the minimisation of an organisation's social, economic and environmental impact, as well as proactive value creation in these areas.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Sustainability

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for workplace sustainability review | 1.1 Identify environmental legislation, regulations and policies for evaluation and reporting requirements 1.2 Assess advantages and opportunities for companies that report sustainability practices 1.3 Establish scope, objectives and method of assessment for workplace sustainability evaluation 1.4 Select reporting format according to organisational policy and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | procedures |
| 2. Conduct workplace sustainability assessment | 2.1 Engage relevant stakeholders for information regarding workplace areas to be assessed 2.2 Collate information on workplace areas to be assessed 2.3 Verify accuracy of information on the sustainability of the workplace areas 2.4 Measure workplace sustainability against method of assessment |
| 3. Develop workplace sustainability reports | 3.1 Identify compliance issues and areas for improvement in sustainability practices 3.2 Document workplace sustainability results according to organisational policy and procedure 3.3 Report information according to the requirements of the selected reporting format 3.4 Present report to management for review and feedback |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|---|
| Numeracy | <ul style="list-style-type: none"> Interprets, analyses and presents numeric and financial information |
| Oral communication | <ul style="list-style-type: none"> Uses specialised vocabulary and features appropriate to context to discuss and confirm requirements |
| Reading | <ul style="list-style-type: none"> Interprets and analyses text from a range of sources to identify key information |
| Writing | <ul style="list-style-type: none"> Prepares strategic business documentation incorporating complex vocabulary, grammatical structure and conventions appropriate to purpose and audience |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information |
| Initiative and enterprise | <ul style="list-style-type: none"> Monitors and modifies organisational policies and procedures according to legislative requirements and organisation goals |
| Planning and organising | <ul style="list-style-type: none"> Plans, organises and implements work activities of self and others that ensure compliance with organisational policies and |

| Skill | Description |
|-------|---|
| | <p>procedures, and legislative requirements</p> <ul style="list-style-type: none">Sequences and schedules complex activities, monitors implementation, and manages relevant communication |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSUS413 Evaluate and report on workplace sustainability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify and conduct a sustainability audit for at least two workplace sustainability issues.

In the course of the above, the learner must:

- develop objectives and corresponding indicators to assess workplace sustainability
- engage relevant stakeholders to obtain data
- collate and analyse data to identify applicable issues in compliance and areas for improvement
- convey findings of the sustainability assessment in a sustainability report, according to report content and formatting requirements, to present to management for review.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, regulations, standards and industry or organisational policies governing sustainability
- workplace processes relevant to sustainability including resource usage, waste, water usage and supply chain
- methods of undertaking an environmental audit including desktop audit and practical audit
- possible sustainability reporting formats including:
 - annual report sustainability section
 - standalone sustainability report
 - triple bottom line report
 - environmental and social impact report
- reporting guidelines to assist sustainability reporting processes including the Global Reporting Guidelines
- Australian and international standards for corporate social sustainability.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- corporate social sustainability legislation, regulations, standards and codes
- workplace reference materials on sustainability practices.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSUS511 Develop workplace policies and procedures for sustainability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop and implement workplace sustainability policies and to modify the policy to suit changed circumstances.

The unit applies to individuals with managerial responsibilities who undertake work developing approaches to create, monitor and improve strategies and policies within workplaces. These individuals also engage with a range of relevant stakeholders and specialists.

'Sustainability' in this unit refers to a broad approach that focuses on the minimisation of an organisation's social, economic and environmental impact, as well as proactive value creation in these areas.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Sustainability

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare workplace sustainability policies | 1.1 Establish scope and objectives of workplace sustainability policies 1.2 Gather information for development of sustainability policies 1.3 Analyse information and consultation insights 1.4 Develop and document sustainability policies according to organisational processes |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 1.5 Incorporate implementation and continuous improvement processes into sustainability policies |
| 2. Implement workplace sustainability policies | 2.1 Present workplace sustainability policies and implementation processes to key stakeholders 2.2 Identify and source resources required to implement sustainability policies 2.3 Support implementation of workplace sustainability policies 2.4 Track continuous improvements in sustainability approaches using recording systems |
| 3. Review implementation of workplace sustainability policies | 3.1 Document outcomes and provide feedback to key personnel and stakeholders 3.2 Identify trends requiring remedial action to promote continuous improvement of performance 3.3 Modify sustainability policies to incorporate improvements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Interprets and uses mathematical equations to calculate numerical information relating to time durations and costs |
| Oral communication | <ul style="list-style-type: none"> Presents information and seeks advice using language appropriate to audience Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates complex textual information to determine legislative and regulatory requirements, trends and outcomes |
| Writing | <ul style="list-style-type: none"> Researches, plans and prepares documentation using format and language appropriate to context, organisational requirements and audience |
| Initiative and enterprise | <ul style="list-style-type: none"> Develops, monitors and modifies organisational policies and procedures according to legislative requirements and organisation goals |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information Plays a lead role in consulting and negotiating positive outcomes with |

| Skill | Description |
|-------------------------|--|
| | a range of stakeholders |
| Planning and organising | <ul style="list-style-type: none">Plans, organises and implements work activities of self and others that ensure compliance with organisational policies and procedures, and legislative requirementsSequences and schedules complex activities, monitors implementation, and manages relevant communicationUses systematic, analytical processes in relatively complex, situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteriaEvaluates outcomes of decisions to identify opportunities for improvement |

Unit Mapping Information

Supersedes and is equivalent to BSBSUS501 Develop workplace policy and procedures for sustainability.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSUS511 Develop workplace policies and procedures for sustainability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and implement workplace policies and procedures for sustainability on at least one occasion, including:
 - implementing sustainability policy and procedures into wider organisational policies and procedures
 - consulting and communicating with relevant stakeholders to generate engagement with sustainability policy development, implementation and continuous improvement.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- Australian and international standards relating to corporate sustainability
- environmental and sustainability legislation, regulations and codes of practice applicable to organisation
- internal and external sources of information and their use in planning and developing organisational sustainability policies and procedures
- elements required for the development of organisational sustainability policies and processes including:
 - agreed outcomes of the policy and procedures
 - policy timeframes and costs
 - performance indicators
 - activities to be undertaken
 - assigned responsibilities
 - record keeping, review and improvement processes
 - common sustainability issues with organisational systems and procedures

- typical barriers to implementing policies and procedures in an organisation and possible strategies to address them.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- corporate sustainability legislation, regulations, standards and codes
- organisational documentation on sustainability and sustainable practices.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSUS601 Lead corporate social responsibility

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to consult with stakeholders to develop, implement and evaluate corporate social responsibility policy in an organisation.

The unit applies to individuals working in senior roles in diverse contexts who have responsibility for ensuring an organisation is positioned to ensure its long-term viability and success.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Business Competence – Sustainability

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify context for corporate social responsibility | 1.1 Qualify and quantify the drivers for corporate social responsibility 1.2 Identify current benefits of, and barriers to, corporate social responsibility for organisation 1.3 Analyse legislation, regulation, standards and organisational policy affecting corporate social responsibility 1.4 Identify future opportunities for socially responsible practices |
| 2. Establish corporate social responsibility policy | 2.1 Identify key stakeholders for organisational corporate social responsibility 2.2 Engage with stakeholders to develop corporate social responsibility objectives and policy |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.3 Develop change management provisions for corporate social responsibility strategy 2.4 Draft and incorporate social responsibility strategy into required organisational systems, procedures and processes 2.5 Prepare and distribute documentation regarding corporate social responsibility strategy |
| 3. Monitor and evaluate corporate social responsibility | 3.1 Conduct review of corporate social responsibility integration with relevant people 3.2 Evaluate corporate social responsibility against organisational sustainability objectives 3.3 Recommend improvements to corporate social responsibility policy and practices |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Numeracy | <ul style="list-style-type: none"> Interprets, analyses and presents numeric and financial information |
| Oral communication | <ul style="list-style-type: none"> Uses specialised vocabulary and features appropriate to context to discuss and confirm requirements |
| Reading | <ul style="list-style-type: none"> Sources, analyses and interprets textual information in the context of complex organisational strategy and compliance requirements |
| Writing | <ul style="list-style-type: none"> Prepares reports and workplace documentation that communicate strategy and related information to suit audience and context |
| Teamwork | <ul style="list-style-type: none"> Uses inclusive and collaborative techniques to cooperate and consult with others to identify options to support policy objectives |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to implement organisation-wide strategies Monitors processes, evaluates performance against agreed benchmarks and recommends improvements to ensure compliance with organisation, statutory and legal requirements |
| Problem solving | <ul style="list-style-type: none"> Recognises, understands and applies legislation, regulation and organisational policies and procedures relevant to strategy |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT624 Develop and implement corporate social responsibility.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSUS601 Lead corporate social responsibility

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- establish, monitor and evaluate corporate social responsibility for two areas or opportunities.

In the course of the above, the candidate must:

- consult and communicate with relevant stakeholders to develop CSR objectives and policy that align to organisational goals
- negotiate with stakeholders to integrate corporate social responsibility practices into policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key provisions of legislation, covenants, standards and codes of practice relating to Australian and international standards relating to CSR
- internal and external sources of information relevant to the CSR framework including:
 - legislation, regulation, standard and codes of practice
 - organisational objectives, culture and current policies and practices
- elements of a CSR strategy including:
 - organisational goals, drivers and expected benefits
 - opportunities and barriers to CSR implementation and operation
 - relevant stakeholders
 - emerging approaches and best practice in CSR relevant to organisational context and industry
 - change management techniques
- procedures for maximising engagement in CSR, including strategies and techniques for:

- consultation
- generating ideas and options
- communicating information
- addressing barriers and resolving problems.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- corporate social sustainability legislation, regulations, standards and codes
- organisational documentation on sustainability including corporate social responsibility.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC101 Operate digital devices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to start up and use a range of basic functions on digital devices.

The unit applies to those who perform a range of routine digital tasks in the various sectors of the business services industry and generally work under direct supervision.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Activate digital device and access features | 1.1 Prepare workspace, furniture and equipment to suit user ergonomic requirements, where required 1.2 Activate digital device, and access or log on according to organisation policies and procedures 1.3 Identify basic functions and features of digital devices 1.4 Customise desktop or application configuration 1.5 Request assistance from relevant personnel for using digital device, where required 1.6 Access help functions, where required |
| 2. Navigate and organise file or application | 2.1 Open, close and access file or application by selecting correct desktop or menu icons |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|--|
| environment | 2.2 Create shortcuts onto the desktop or menu, and request assistance from relevant personnel, where required 2.3 Identify and apply keyboard functions for both alpha and numeric keyboard input devices 2.4 Create folders and subfolders with relevant names 2.5 Identify and access storage devices relevant to the digital device 2.6 Download new applications with assistance from relevant stakeholder 2.7 Use search functions to locate files or applications |
| 3. Edit and update stored information | 3.1 Rename and move folders and subfolders 3.2 Remove files or applications as required, with assistance from relevant stakeholder 3.3 Open relevant file, document, or application 3.4 Edit content of the file, document, application, or similar in accordance with simple instructions 3.5 Save changes in digital device |
| 4. Deactivate personal digital device | 4.1 Save and close all open files, documents or applications 4.2 Deactivate digital device according to user procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Recognises textual information within internal procedures and technical documents to determine and complete work requirements |
| Writing | <ul style="list-style-type: none"> Inputs information using familiar text types and records numerical and textual information for file naming conventions |

Unit Mapping Information

Supersedes and is equivalent to BSBITU111 Operate a personal digital device.

Supersedes but is not equivalent to:

- BSBITU112 Develop keyboard skills
- BSBITU307 Develop keyboarding speed and accuracy.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC101 Operate digital devices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least three occasions, activate, navigate, and deactivate a digital device.

In the course of the above, the candidate must:

- follow user procedures to power up and access a digital device
- follow user procedures and system information when using the basic functions on digital device, seeking assistance where required
- shut down applications and the device.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- user procedures for powering up and accessing a digital device
- key components of the digital system, including what each component does
- ergonomic issues that impact the use of digital devices
- key functions of the operating system
- organisational conventions for naming files.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- device user information
- different types of digital device.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC201 Use business software applications

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to select and use software and organise electronic information and data.

The unit applies to those who use a limited range of practical skills with a fundamental knowledge of equipment use and the organisation of data in a defined context, under direct supervision or with limited individual responsibility.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Select and prepare to use technology | 1.1 Identify task purpose, audience, format and presentation requirements, and clarify with relevant personnel, where required 1.2 Select relevant technology and software applications to achieve requirements of the task 1.3 Adjust workspace, furniture and equipment to suit own ergonomic requirements |
| 2. Input and process information or data | 2.1 Identify and open application, according to task and organisational requirements 2.2 Enter information or data into application according to organisational requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|--|
| | 2.3 Ensure information or data is checked and amended according to organisational and task requirements 2.4 Format information or data using appropriate application functions according to organisational and task requirements 2.5 Use relevant help functions to overcome simple issues |
| 3. Finalise and store document | 3.1 Review and edit final information or data, and prepare for storage in accordance with organisational and task requirements 3.2 Name and store document and exit application |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------|--|
| Reading | <ul style="list-style-type: none">Recognises and interprets information from familiar sources to determine job role and task requirements |
| Writing | <ul style="list-style-type: none">Produces and amends files to meet task and organisational requirementsCompletes required documentation using organisational formats |

Unit Mapping Information

Supersedes and is equivalent to:

- BSBITU211 Produce digital text documents
- BSBITU212 Create and use spreadsheets
- BSBWOR204 Use business technology.

Supersedes but is not equivalent to BSBCUE301 Use multiple information systems.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC201 Use business software applications

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- select and use at least three business software applications on two occasions each.

In the course of the above, the candidate must:

- select and use technology safely and according to organisational requirements
- identify and address faults according to requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of:
 - organisation's work health and safety requirements relevant to own role
 - organisation's requirements for file naming and storage
 - applications used for organising electronic information and data.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources
- electronic files, information and data
- workplace documentation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC202 Use digital technologies to communicate in a work environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to effectively identify, select and use available methods of digital communication in a workplace context. These methods may include email, instant messaging and other similar platforms.

The unit applies to those who use digital technology to communicate with relevant stakeholders. This will be particularly relevant to individuals in teams that work remotely. The individual will use a limited range of practical skills and fundamental knowledge in a defined context under direct supervision or with limited individual responsibility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify purpose and methods of digital communication | 1.1 Identify purpose for communication, intended audience and content of proposed communication 1.2 Identify available digital communication applications by accessing relevant sources of information and clarify with relevant personnel, where required 1.3 Select most appropriate application for communication according to available resources and relevant organisational policies and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2. Implement procedures to send and receive digital communications | <p>2.1 Access application for sending and receiving digital communications according to organisational policies and procedures</p> <p>2.2 Create outgoing digital communication, check for accuracy and ensure that any required attachments are included according to application requirements and organisational policies and procedures</p> <p>2.3 Identify urgent, confidential, personal, suspicious or dangerous digital communication and take appropriate action, clarify with relevant stakeholder, where required</p> <p>2.4 Access and identify most appropriate action in response to incoming digital communications, according to organisational policies and procedures</p> |
| 3. Assist with managing digital communications | <p>3.1 Follow established security levels and filters for incoming digital communications according to organisational policies and procedures</p> <p>3.2 Assist relevant personnel to create plan for monitoring and maintaining digital communications across multiple applications according to organisational policies and procedures</p> <p>3.3 Store digital communications and attachments according to organisational policies and procedures</p> <p>3.4 Archive or permanently delete digital communications according to organisational policies and procedures</p> <p>3.5 Create methods for communicating electronically with targeted groups of stakeholders as relevant to organisation</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none">Recognises textual information within different materials and interprets information to determine requirements, as well as confirming accuracy of content |
| Writing | <ul style="list-style-type: none">Records key information relevant to requirements and prepares simple correspondence using basic punctuation, text and correct spelling |
| Oral Communication | <ul style="list-style-type: none">Obtains information through listening and questioning and uses clear and appropriate language suitable to audience |

| SKILL | DESCRIPTION |
|-----------------|--|
| Self-management | <ul style="list-style-type: none">Recognises and follows explicit and implicit protocols and meets expectations associated with own role |
| Problem solving | <ul style="list-style-type: none">Recognises and responds to routine problems in context of own work |

Unit Mapping Information

Supersedes and is equivalent to BSBITU213 Use digital technologies to communicate remotely.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC202 Use digital technologies to communicate in a work environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on four occasions send digital communications
- on four occasions receive and process digital communications.

In the course of the above, the candidate must:

- follow organisational and technology provider requirements when communicating electronically across multiple digital applications, including in relation to security of communications
- follow organisational policy and procedures when managing all aspects of digital communication, including by storing, filing, archiving, and deleting inbound communications
- communicate electronically with targeted groups of colleagues, clients or similar as relevant to organisation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- existing and emerging methods of digital communication, including strengths and limitations
- industry practice relating to digital communication etiquette in a workplace setting
- commercial sensitivities in relation to knowledge management
- organisational policies and procedures relating to the use of digital communication
- security levels and filters for digital communications.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- industry applications/platforms for communicating digitally
- relevant organisational policies and procedures
- relevant workplace documentation and resources.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC203 Research using the internet

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan, conduct and present research using the internet within an organisational context.

The unit applies to individuals who perform a range of routine tasks in the workplace, using a limited range of practical skills and fundamental knowledge of research in a defined context, under direct supervision or with limited individual responsibility.

No licensing, legislation or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan research | 1.1 Confirm task requirements 1.2 Identify research objectives in consultation with relevant stakeholders 1.3 Identify potential sources for research information according to organisational policies and procedures 1.4 Select application and search engine according to organisational policies and procedures 1.5 Plan key search terms to be used in research |
| 2. Conduct research | 2.1 Power up digital device and access internet using selected application |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------|--|
| | 2.2 Open search engine according to research plan 2.3 Enter search terms according to research plan 2.4 Collect information according to research plan and organisational policies and procedures 2.5 Use relevant help functions to overcome simple issues, where required |
| 3. Present research | 3.1 Document information collected according to task requirements 3.2 Deliver document to relevant stakeholders according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Recognises textual information within organisational and task requirements to determine work requirements |
| Writing | <ul style="list-style-type: none"> Records numerical and textual information in accordance with requirements of task |
| Oral Communication | <ul style="list-style-type: none"> Participates in a variety of spoken exchanges with relevant stakeholders in an effort to clarify research purpose, audience and presentation requirements |
| Self-management | <ul style="list-style-type: none"> Recognises and follows explicit and implicit protocols and meets expectations associated with own role |
| Technology | <ul style="list-style-type: none"> Understands functions and features of specific digital applications and uses these to perform work tasks |

Unit Mapping Information

No equivalent unit. New unit.

Supersedes but is not equivalent to BSBITU315 Purchase goods and services online.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC203 Research using the internet

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least three occasions, plan, conduct, and present research on a work task using the internet.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key elements of basic research methods
- key functions of required applications
- relevant organisational policies and procedures
- key principles of documenting research.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- device user information
- relevant organisational policies and procedures
- workplace documentation and resources.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC301 Design and produce business documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to design and produce various business documents. It includes selecting and using a range of functions on a variety of computer applications.

The unit applies to those who possess fundamental skills in computer operations. They may exercise discretion and judgement using appropriate theoretical knowledge of document design and production to provide technical advice and support to a team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Select and prepare resources | 1.1 Select and use technology and software applications to produce required business documents 1.2 Select layout and style of publication according to information and organisational requirements 1.3 Use basic design principles and ensure document design is consistent with organisational requirements 1.4 Discuss and clarify format and style with required stakeholder |
| 2. Design document | 2.1 Identify, open and create files according to task and organisational requirements 2.2 Design document and ensure efficient entry of information |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------|---|
| | 2.3 Use a range of functions to ensure consistency of design and layout |
| 3. Produce document | 3.1 Complete document production according to organisational policies, procedures and requirements 3.2 Check document produced to ensure it meets task requirements for style and layout 3.3 Store document appropriately and save document 3.4 Use help function to overcome basic difficulties with document design and production, where required |
| 4. Finalise document | 4.1 Proofread document for readability, accuracy and consistency of language, style and layout prior to final output 4.2 Modify document according to task requirements 4.3 Name and store document in accordance with organisational requirements and exit application 4.4 Present document according to task requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-----------------|---|
| Reading | <ul style="list-style-type: none">Recognises and interprets textual information from a range of sources to determine and adhere to requirements |
| Writing | <ul style="list-style-type: none">Develops documents using required format, accurate spelling and grammar and terminology specific to requirementsOrganises content to support purposes and audience of material, using clear and logical language |
| Self-management | <ul style="list-style-type: none">Recognises and follows explicit and implicit protocols and meets expectations associated with own role |

Unit Mapping Information

Supersedes and is equivalent to:

- BSBITU306 Design and produce business documents
- BSBITU313 Design and produce digital text documents.

Supersedes but is not equivalent to:

- BSBINT305 Prepare business documents for the international trade of goods
- BSBITU309 Produce desktop published documents.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC301 Design and produce business documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- design, produce and finalise four different types of business documents, using at least two different software applications.

In the course of the above, the candidate must:

- comply with organisational policies and procedures for producing business documents
- adhere to task requirements when producing documents including:
 - applying basic design principles
 - applying consistent formatting
 - using appropriate styles
 - using correct layouts
 - proofreading
- use required data storage options.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- technology required to produce document
- key functions and features of contemporary computer applications
- organisational policies and procedures
- organisational requirements for document design, including style guide.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources
- relevant software applications
- style guide
- organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC302 Design and produce spreadsheets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to develop spreadsheets through the use of spreadsheet applications.

The unit applies to individuals employed in a range of environments who tend to be personally responsible for designing and working with spreadsheets under minimal supervision. These individuals are generally required to have intermediate knowledge and understanding of a number of spreadsheet applications.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Select and prepare resources | 1.1 Identify task purpose and audience 1.2 Identify task requirements according to data entry, storage, output, timeline and presentation format 1.3 Select most appropriate application to produce spreadsheet, according to available resources and organisational policies and procedures |
| 2. Plan spreadsheet design | 2.1 Design spreadsheet design to suit purpose, audience and information requirements of task 2.2 Confirm spreadsheet is designed to enhance readability and appearance, and is in accordance with organisational and task |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|---|
| | <p>requirements</p> <p>2.3 Use available application functions and confirm consistency of design and layout, adhering to organisational and task requirements</p> |
| 3. Create spreadsheet | <p>3.1 Enter data, check and amend to maintain consistency of design and layout, in accordance with organisational and task requirements</p> <p>3.2 Format spreadsheet using application functions, according to organisational policies and procedures and presentation requirements</p> <p>3.3 Consult with relevant stakeholders and confirm formulae are tested and output meets task requirements</p> <p>3.4 Use required help functions and action issues as required</p> |
| 4. Produce charts | <p>4.1 Select chart type and design that offers analysis of numerical data, and meets organisational and task requirements</p> <p>4.2 Create charts using required data range in spreadsheet</p> <p>4.3 Modify chart type and layout using formatting features, adhering to organisational and task requirements</p> |
| 5. Finalise and present spreadsheets | <p>5.1 Review and edit final spreadsheet and accompanying charts, and prepare for delivery according to task requirements</p> <p>5.2 Deliver document to required stakeholders according to organisational requirements, policies and procedures</p> <p>5.3 Name and store spreadsheet according to organisational requirements and exit application</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|----------|--|
| Reading | <ul style="list-style-type: none"> Recognises and interprets numerical and textual information to determine organisational and task requirements |
| Writing | <ul style="list-style-type: none"> Inputs numerical and key reporting information when creating and finalising spreadsheets Uses format, layout, style guides and standard naming conventions to organise data according to purpose and audience |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical equations to create simple formulae and validate numerical data |

| SKILL | DESCRIPTION |
|----------|--|
| Teamwork | <ul style="list-style-type: none">• Collaborates with others to achieve joint outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBITU314 Design and produce spreadsheets.

Supersedes but is not equivalent to BSBITU311 Use simple relational databases.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC302 Design and produce spreadsheets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan, design, produce and finalise a spreadsheet on at least four occasions.

In the course of the above, the candidate must:

- produce spreadsheet documents that align to document purpose and appropriate to target audience
- design spreadsheets using:
 - formulas and functions with:
 - addition, subtraction, division, multiplication
 - brackets
- design spreadsheets that address a range of data and organisational requirements
- use software functions to create spreadsheets that adhere to organisational requirements relating to style and presentation
- use relevant help functions to rectify document issues
- produce spreadsheet document in appropriate format for review, including ability to create and modify intermediate-level charts that analyse the dataset.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key elements of formatting of spreadsheets appropriate to workplace documents, including the ability to calculate:
 - sum totals
 - averages
 - counts of values
- key features of spreadsheet applications, both cloud-based and non-cloud based

- key features of organisational guidelines on spreadsheet design and use
- organisational requirements for ergonomics, work periods and breaks, and sustainability in relation to spreadsheet production.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- industry software/applications for producing spreadsheets
- digital device user information
- relevant legislation and codes of practice
- relevant organisational policies and procedures
- workplace documentation and resources, including style guide.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC303 Create electronic presentations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to design and produce electronic presentations using various applications and platforms.

The unit applies to individuals employed in a range of work environments who design electronic presentations. They may work as individuals providing administrative support within an enterprise, or may be responsible for production of their own electronic presentations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to create presentation | 1.1 Organise personal work environment according to ergonomic requirements 1.2 Identify purpose, audience and mode of presentation in consultation with content author or relevant stakeholder 1.3 Identify organisational and task requirements 1.4 Select required application to produce presentation, according to available resources and organisational policies and procedures |
| 2. Create presentation | 2.1 Plan presentation, notes and handouts according to organisational and task requirements and image and style requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------|--|
| | 2.2 Use application functions for consistency of design and layout 2.3 Balance presentation features for visual impact and emphasis 2.4 Use application features and customise presentation as required 2.5 Prepare presentation according to organisational requirements 2.6 Use relevant help functions to overcome issues relating to presentation creation, where required |
| 3. Finalise presentation | 3.1 Check presentation for spelling and consistency in presentation features and style, according to task requirements 3.2 Prepare presentation materials for delivery according to presenter or audience requirements 3.3 Name and store presentation appropriately, according to organisational requirements and exit application |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none">Evaluates and integrates information and ideas to construct meaning in an effort to design and create a presentation |
| Writing | <ul style="list-style-type: none">Communicates relationships between ideas and information in a style appropriate to audience and purpose in accordance with organisational and task requirements |
| Planning and organising | <ul style="list-style-type: none">Plans and implements routine tasks and workload making limited decisions on sequencing and timing |
| Teamwork | <ul style="list-style-type: none">Collaborates with others to achieve joint outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBITU312 Create electronic presentations.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC303 Create electronic presentations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on three occasions prepare, create and finalise an electronic presentation.

In the course of the above, the candidate must:

- follow relevant ergonomic requirements and organisational policies and procedures
- adhere to task requirements and organisational policies and procedures relating to:
 - following designated timelines
 - consistency of design and layout
 - editing and style requirements
- use relevant help functions to rectify presentation issues
- produce presentation in appropriate format
- store presentation in accordance with organisation policies and procedures relating to data security.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- design features and their effect on the readability and appearance of electronic presentations
- key functions of relevant applications for producing electronic presentations
- organisational requirements for ergonomics
- key features of organisational style and presentation guide.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and materials
- relevant digital applications
- examples of electronic presentations
- relevant organisational policies and procedures
- relevant workplace documentation and resources including style guide.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC401 Design and produce complex text documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to design and develop business documents using complex technical features of word processing software.

The unit applies to those who work in a range of business environments and have skills which may be applied in the provision of administrative support within an enterprise, or by technical experts responsible for producing their own word-processed documents.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to produce word processed documents | <ul style="list-style-type: none">1.1 Identify ergonomics requirements and organise personal work environment1.2 Use safe work practices to ensure ergonomic, energy and resource conservation requirements are met1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant stakeholders, where required1.4 Identify organisational requirements for text-based business documents to ensure consistency of style and image1.5 Evaluate complex technical functions of software for usefulness in fulfilling requirements of the task |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|---|
| 2. Design complex documents | <p>2.1 Design document structure and layout according to purpose, audience and information requirements of task</p> <p>2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout</p> <p>2.3 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout</p> <p>2.4 Use help function to overcome problems with document design and production</p> |
| 3. Add complex tables and other data | <p>3.1 Insert a table into document, change cells according to information requirements</p> <p>3.2 Format rows and columns, where required</p> <p>3.3 Insert images and other data and format, where required</p> |
| 4. Produce documents | <p>4.1 Develop documents, and achieve required results</p> <p>4.2 Preview, adjust and publish documents according to organisational and task requirements</p> <p>4.3 Name and store documents in accordance with organisational requirements and exit application</p> <p>4.4 Prepare document according to organisational requirements, policies and procedures</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|--|
| Reading | <ul style="list-style-type: none">Recognises and interprets textual information from a range of resources to determine and confirm requirements and to assist with document issues |
| Writing | <ul style="list-style-type: none">Develops material using required format and incorporating technical functions to meet business needs |
| Self-management | <ul style="list-style-type: none">Recognises and follows explicit and implicit protocols and meets expectations associated with own role |
| Teamwork | <ul style="list-style-type: none">Collaborates with others to achieve joint outcomes |
| Planning and organising | <ul style="list-style-type: none">Applies formal processes when planning complex tasks, producing plans with logically sequenced steps |

Unit Mapping Information

Supersedes and is equivalent to BSBITU401 Design and develop complex text documents.

Supersedes but is not equivalent to BSBITU404 Produce complex desktop published documents.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC401 Design and produce complex text documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare design and produce at least four complex text documents.

In the course of the above, the candidate must:

- follow organisational and safe work practices
- adhere to organisational requirements for:
 - producing documents within designated timelines
 - naming and storing documents
- adhere to task requirements when producing complex documents including:
 - using appropriate styles and layout consistently throughout the document
 - using correct formatting and document structure
- use the following features:
 - mail merge
 - document styles
 - references (footnotes/endnotes)
 - Table of Contents
 - paragraph
 - line spacing
 - section breaks
 - alternating headers
 - footers
- resolve issues by referring to user documentation and online help
- apply knowledge of complex operation and functions of industry software applications.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- formatting styles and their effect on formatting, readability and appearance of documents
- organisational requirements for ergonomics, work periods and breaks, and conservation techniques
- purpose and contents of an organisational style guide
- key aspects of organisational policies and procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

- This includes access to:
- organisational policies and procedures
- workplace documentation and resources relevant to performance evidence
- industry software packages and user instructions.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC402 Design and produce complex spreadsheets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to use spreadsheet software to complete business tasks and produce complex documents.

The unit applies to individuals employed in a range of work environments who require skills in creation of complex spreadsheets to store and retrieve data. They may work as individuals providing administrative support within an enterprise, or may be independently responsible for designing and working with spreadsheets relevant to their own work roles.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare and plan to develop spreadsheet | 1.1 Organise personal work environment in accordance with ergonomic requirements 1.2 Analyse task and determine specifications for spreadsheets 1.3 Identify requirements of data entry, storage, output, reporting and presentation requirements 1.4 Apply work organisation strategies and energy and resource conservation techniques |
| 2. Develop a linked spreadsheet solution | 2.1 Use spreadsheet design software functions and formulae to meet identified requirements 2.2 Link spreadsheets according to software procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.3 Format cells and use data attributes assigned with cell references, according to task requirements 2.4 Test formulae to confirm output meets task requirements |
| 3. Automate and standardise spreadsheet operation | 3.1 Evaluate and identify tasks requiring automation 3.2 Create, use and edit macros to fulfil requirements of task and automate spreadsheet operation 3.3 Develop, edit and use templates and ensure consistency of design and layout according to task requirements |
| 4. Use spreadsheets | 4.1 Enter, check and amend data according to organisational and task requirements 4.2 Import and export data between compatible spreadsheets and adjust documents, according to software and organisational procedures 4.3 Use help function to overcome problems with spreadsheet design and production 4.4 Preview, adjust and prepare spreadsheet in accordance with organisational and task requirements |
| 5. Represent numerical data in graphic form and store spreadsheet | 5.1 Determine style of graph to meet specified requirements and manipulate spreadsheet data, where required 5.2 Create graphs with labels and titles from numerical data contained in a spreadsheet file 5.3 Name and store spreadsheet in accordance with organisational requirements and exit application |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Recognises and interprets numerical and textual information within a range of sources to determine and complete work according to requirements Reviews information to determine accuracy and consistency |
| Writing | <ul style="list-style-type: none"> Uses formal mathematical language to create formulas and enters routine data using a format appropriate to requirements Develops material using required format and incorporating technical functions to meet business needs |
| Oral | <ul style="list-style-type: none"> Uses listening and questioning skills to clarify requirements |

| SKILL | DESCRIPTION |
|-------------------------|---|
| Communication | |
| Numeracy | <ul style="list-style-type: none">Represents mathematical information in an alternative form and analyses information to determine required spreadsheet formulae and macros |
| Self-management | <ul style="list-style-type: none">Recognises and follows explicit and implicit protocols and meets expectations associated with own role |
| Planning and organising | <ul style="list-style-type: none">Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps |

Unit Mapping Information

Supersedes and is equivalent to BSBITU402 Develop and use complex spreadsheets.

Supersedes but is not equivalent to BSBITA411 Design and develop relational databases.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC402 Design and produce complex spreadsheets

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions, prepare, develop, and use a complex spreadsheet.

In the course of the above, the candidate must:

- follow organisational and safe work practices
- adhere to organisational requirements for:
 - ensuring consistency of style, design and layout
 - saving and publishing documents within designated timelines
 - naming and storing documents
- adhere to identified or task requirements when producing documents including:
 - editing macros and automating some tasks
 - using appropriate templates
 - creating graphs to represent data
- resolve issues by referring to user documentation and online help
- use appropriate data storage options.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- advanced functions of spreadsheet software applications
- key aspects of formatting and design on presentation and readability of data
- organisational requirements for ergonomics, work periods and breaks, and conservation techniques
- key aspects of organisational policies and procedures
- key methods to test formulae.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant organisational policies and procedures
- workplace documentation and resources
- industry software packages and user instructions.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC403 Apply digital solutions to work processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit defines the skills, knowledge and outcomes to integrate digital technologies into common management practice.

The unit applies to supervisors, teams, and new and emerging leaders who need to apply digital vision and solutions within structured work environments.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Use digital workplace information | 1.1 Identify available workplace digital applications for communications, technologies and networks 1.2 Locate and use digital information 1.3 Review digital information sources for validity and reliability 1.4 Create, store and retrieve information in digital format 1.5 Continuously review trends and innovations in relevant digital technology suitable for workplace innovation |
| 2. Integrate digital solutions into work processes | 2.1 Identify areas in workplace that could integrate digital solutions 2.2 Select digital solutions required in workplace operations 2.3 Review digital solutions that are fit for purpose and according to organisational policies and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 2.4 Implement digital solutions into workplace operations 2.5 Identify and adopt digital media protocols and conventions 2.6 Train and support team members in the application of digital solutions |
| 3. Comply with intellectual property rights | 3.1 Identify relevant intellectual property legislation, regulations and the organisational policy 3.2 Review digital process and applications and confirm compliance with intellectual property requirements 3.3 Document, register and report relevant matters related to intellectual property |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Sources, analyses and interprets information in the context of organisational strategy and compliance requirements |
| Writing | <ul style="list-style-type: none">Develops texts dealing with complex concepts using specialised and detailed language to convey explicit information, requirements and recommendations in accordance with legal and organisational requirements |
| Oral communication | <ul style="list-style-type: none">Presents information using language and features appropriate to the audience |
| Teamwork | <ul style="list-style-type: none">Uses a collaborative instructional approach to encourage, support and develop understanding and skills in others |

Unit Mapping Information

Supersedes and is equivalent to BSBMGT407 Apply digital solutions to work processes.

Supersedes but is not equivalent to:

- BSBCUE407 Administer customer engagement technology
- BSBITS411 Maintain and implement digital technology
- BSBMGT519 Incorporate digital solutions into plans and practices.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC403 Apply digital solutions to work processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement at least two digital solutions in the work processes of an organisation or work area.

In the course of the above, the candidate must:

- identify digital applications, services and information and evaluate them for use in the workplace including:
 - checking the validity and reliability of digital information
 - monitoring trends and innovations in digital technology
 - selecting digital services and solutions suitable for the workplace
 - compliance to relevant legislation, regulations and organisational policies
- identify and implement protocols and procedures to integrate digital services and solutions including:
 - intellectual property requirements
 - digital media protocols and conventions
 - storage and retrieval of digital information
 - training, mentoring and other support for team members.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislation, regulations, and organisational policies and procedures relevant to working with digital technology and information
- strategies to train and support team members in applying digital technology
- key elements to consider when evaluating whether digital technology and information options are fit for purpose

- intellectual property risks to organisation in relation to digital technology.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant legislation and regulations
- workplace documentation and resources.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC404 Use digital technologies to collaborate in a work environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to understand the fundamentals of using digital technologies to collaborate in a workplace context, including working as part of a remote team. It involves undertaking a basic review of organisational processes to identify opportunities for using digital technologies to complete work tasks more efficiently and effectively.

The unit applies to those who use problem-solving skills and take responsibility for adopting and promoting approaches to improve organisational operations, particularly relating to the use of digital technologies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review existing digital technology use in the business | 1.1 Identify current collaborative ways of working 1.2 Assess performance of current collaborative ways of working against organisational strategies and objectives 1.3 Collate information collected through review and provide to relevant personnel as required |
| 2. Identify opportunities to implement digital | 2.1 Identify available digital technologies by accessing relevant sources of information |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| technologies for workplace collaboration | 2.2 Seek assistance from specialist advisors, where required 2.3 Assess existing collaborative work against available and existing digital technologies 2.4 Identify opportunities and priorities for digital technology in collaborative work 2.5 Prepare a business case for implementing new digital solutions to support collaboration and seek approval, where required |
| 3. Implement and use digital technologies to collaborate in the workplace | 3.1 Assess business goals and objectives and develop a plan to introduce new collaborative technologies 3.2 Communicate and promote key features of the plan to relevant stakeholders 3.3 Implement digital technologies according to plan and organisational requirements, policies and procedures 3.4 Organise training in digital technologies for collaboration for relevant stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Actively reinforces workplace learning by encouraging personnel to expand their digital literacy |
| Reading | <ul style="list-style-type: none"> Organises, evaluates and critiques information from a wide variety of textual material |
| Writing | <ul style="list-style-type: none"> Develops material for a specific audience using clear language and workplace conventions to convey explicit information, requirements and recommendations |
| Oral communication | <ul style="list-style-type: none"> Uses appropriate, detailed and clear language to address key personnel and disseminate information Uses listening and questioning skills to confirm understanding of requirements |
| Teamwork | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion |
| Problem solving | <ul style="list-style-type: none"> Applies problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action |

Unit Mapping Information

Supersedes and is equivalent to BSBITU422 Use digital technologies to collaborate in the workplace.

Supersedes but is not equivalent to BSBITB511 Establish and maintain a network of digital devices.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC404 Use digital technologies to collaborate in a work environment

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan and implement use of digital technology to collaborate in a work environment at least once.

In the course of the above, the candidate must:

- review business use of technology for collaboration and identify opportunities, priorities and risks associated with adopting new technologies according to organisational strategies
- collect, analyse and present relevant information about digital applications
- create and present a business case to relevant stakeholders for adopting new collaborative digital technologies
- develop and communicate a plan to implement new ways of working collaboratively using digital technologies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- fundamentals of common digital applications, including key terms, concepts and user features
- organisational requirements, policies and procedures
- collaborative technologies and their use in a business context
- format and content of a business case in the organisation
- strategies for training and coaching in digital technologies
- organisational commercial strategy relevant to digital technologies
- key sources of information about digital applications, and options specific to the business.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources relevant to performance evidence
- relevant legislation, regulations, standards and codes
- relevant organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC405 Review and maintain organisation's digital presence

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to undertake data analysis, review digital presence content, and update and maintain digital presence.

The unit applies to those who have knowledge of relationship between digital presence and core functions of an organisation. They also have working knowledge and skills to perform basic updates to website and other digital and social media. They may provide administrative support within an organisation or be other individuals who have been delegated this responsibility.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review digital presence content and use | 1.1 Monitor and analyse customer and user feedback according to organisational requirements 1.2 Analyse automatically collected data and identify trends 1.3 Make recommendations on changes to digital presence and its content in response to feedback, data analysis and relevant regulatory requirements 1.4 Review cost implications of the recommended changes and determine viability 1.5 Approve changes scheduled for implementation |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2. Update digital presence | <ul style="list-style-type: none">2.1 Identify sources of information on the organisation, including website and social media platforms2.2 Replace superseded and inaccurate information with current information and add additional material according to organisational requirements2.3 Follow protocols for ensuring the accuracy and authenticity of information2.4 Remove services no longer available or required and add new services according to organisational requirements2.5 Check offline information against online information and rectify any discrepancies according to organisational timelines2.6 Follow security procedures for updating digital presence |
| 3. Carry out non-technical maintenance | <ul style="list-style-type: none">3.1 Analyse user feedback to confirm faults are not user issues3.2 Rectify faults and make improvements to digital presence in response to user feedback approved by the organisation3.3 Add new digital features and remove redundant features according to organisational requirements3.4 Change digital presence according to changes in marketing strategy, organisational requirements, policies and procedures |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none">• Recognises text within job specifications and work processes related to the outcomes of the job |
| Writing | <ul style="list-style-type: none">• Records key information related to the outcomes of the job |
| Numeracy | <ul style="list-style-type: none">• Uses basic numeracy skills to determine cost implications and viability |
| Self-management | <ul style="list-style-type: none">• Accepts responsibility and ownership for the task and makes decisions on completion parameters and the need to coordinate with others• Takes personal responsibility for following security procedures and meeting organisational requirements |
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning, sequencing tasks for efficient and effective organisational outcomes |

| SKILL | DESCRIPTION |
|-----------------|---|
| Problem solving | <ul style="list-style-type: none">• Uses problem solving processes to identify and analyse technical issues• Contributes to continuous improvement of digital presence by applying basic principles of analytical thinking |
| Technology | <ul style="list-style-type: none">• Understands the purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete tasks in accordance with security requirements |

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to BSBEBU401 Review and maintain a website.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC405 Review and maintain organisation's digital presence

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- on at least two occasions, review, update and carry out maintenance on an organisation's digital presence, including:
 - website
 - social media platforms.

In the course of the above, the candidate must:

- analyse data and make recommendations about changes to digital presence
- update digital presence according to organisational requirements
- analyse data, identify and resolve faults, errors and complaints about digital presence.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of relevant digital platforms, including:
 - social media
 - websites
 - digital directories
- key provisions of relevant legislation, regulations, and standards and codes of practice that may affect aspects of organisation's digital presence
- basic principles of design and maintenance of relevant platforms
- key aspects of online security issues
- organisational policies and procedures relevant to digital presence
- key methods of data analysis relevant to online stakeholder engagement.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources
- documentation relating to analysis and strategies/policies for implementation
- organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC501 Develop and implement an e-commerce strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to evaluate e-commerce models and strategies for use in a business context. This includes the ability to incorporate results of evaluations into design of an e-commerce strategy, including marketing, buying and selling goods and services online.

The unit applies to those who possess skills and knowledge in a specialist business area, as well as knowledge of digital applications and other technologies. They apply these skills and knowledge in the evaluation, selection and implementation of new strategies for business, which incorporate e-commerce solutions. They may be responsible for overseeing these tasks along with technical or other knowledge experts.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Analyse opportunities for e-commerce | 1.1 Undertake a competitive analysis to determine the impact emerging trends will have on industry sectors and competitors 1.2 Complete value chain analysis and identify processes and relationships that may benefit from the adoption of e-commerce solutions, according to organisational strategies 1.3 Identify threats and opportunities of e-commerce implementation and evaluate potential contributions to the organisation |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------------------|---|
| | <p>1.4 Conduct resource analysis and identify cost and revenue implications in opportunities, according to organisational policies and procedures</p> <p>1.5 Identify and evaluate legal and ethical issues in e-commerce opportunities</p> |
| 2. Evaluate e-commerce models | <p>2.1 Identify and analyse business-to-business, business-to-consumer, intra-organisational e-commerce applications and e-commerce models, and assess applicability to own organisation</p> <p>2.2 Rank compatible e-commerce models in terms of their strengths and weaknesses, identify resourcing, technical and security requirements of each and assess according to organisational strategies</p> <p>2.3 Analyse cost implications of implementation of e-commerce models</p> <p>2.4 Determine an e-commerce model most appropriate in relation to organisational strategies</p> |
| 3. Design an e-commerce strategy | <p>3.1 Formulate purpose, objectives and values for the e-commerce</p> <p>3.2 Identify target market, and value chain structure according to chosen e-commerce model</p> <p>3.3 Identify and obtain technical needs and expertise required to implement e-commerce model</p> <p>3.4 Investigate and identify possible culture issues, and develop plan to manage transition to e-commerce, according to organisational policies and procedures</p> |
| 4. Implement an e-commerce strategy | <p>4.1 Develop policies and procedures that support customers, supply chain and staff and ensure successful implementation</p> <p>4.2 Monitor performance of organisational goals and adjust policies and procedures to respond to changing requirements of customers, staff and supply chain</p> <p>4.3 Review e-commerce systems and models, seek feedback from users and stakeholders responsible for e-commerce implementation</p> <p>4.4 Incorporate evaluation results and feedback and improve future e-commerce strategies</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none">Interprets a range of textual information to evaluate opportunities, possible exemplars and technical considerations |
| Writing | <ul style="list-style-type: none">Takes personal notes and develops workplace documentation that clarifies complex ideas using language and structure to suit context and audience |
| Oral Communication | <ul style="list-style-type: none">Articulates information clearly using language and tone appropriate to audience and environmentUses active listening and questioning techniques to receive feedback and confirm understanding |
| Numeracy | <ul style="list-style-type: none">Analyses numerical information to determine resources required for job |
| Initiative and enterprise | <ul style="list-style-type: none">Develops and reviews organisational procedures to achieve broader workplace goalsInvestigates new and innovative ideas as a means to continuously improve work practices and processes |
| Self-management | <ul style="list-style-type: none">Takes responsibility for developing and implementing organisational processes that comply with legislative requirements and achieve required outcomes |
| Problem solving | <ul style="list-style-type: none">Systematically gathers and analyses all relevant information and evaluates options to solve problems or make decisions |
| Technology | <ul style="list-style-type: none">Uses digital technologies and systems safely, legally and ethically to access, store and share information |

Unit Mapping Information

Supersedes and is equivalent to BSBEBU511 Develop and implement an e-business strategy.

Supersedes but is not equivalent to BSBEBU502 Implement e-business solutions.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC501 Develop and implement an e-commerce strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- design and implement an e-commerce strategy for an organisation or work area.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- methods for conducting value chain analysis when assessing potential e-commerce solutions
- key features of relevant legislation, regulations, standards and codes of practice that may affect the implementation of e-commerce solution
- key features of common e-commerce models
- organisational policies and procedures
- key features of organisational strategy related to e-commerce solutions.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace equipment and resources
- relevant organisational policies and procedures
- relevant legislation, regulations and codes of practice.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTEC601 Review organisational digital strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to review an organisation's digital strategy and assess whether it is fulfilling its objectives according to relevant performance indicators.

The unit applies to individuals who are responsible for reviewing the operation and effectiveness of an organisation's digital strategy to ensure the strategy remains according to organisation's objectives.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence - Technology Use

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop plan for review of digital strategy | 1.1 Obtain and interpret information on organisation's policies, procedures and objectives related to digital strategy 1.2 Develop a review methodology 1.3 Prepare review plan detailing established review criteria, organisational objectives and the information to be collected 1.4 Ensure approval of plan from relevant stakeholders |
| 2. Collect review information | 2.1 Source relevant information according to review plan |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.2 Organise, interpret and evaluate collected information against established review criteria according to review plan 2.3 Discuss issues interpreting information and address appropriately in consultation with relevant stakeholders 2.4 Organise interpreted review information for analysis |
| 3. Analyse the collected information | 3.1 Analyse review information according to review plan 3.2 Review and discuss outcomes and findings of the analysis with relevant stakeholders |
| 4. Determine review findings and outcomes | 4.1 Develop and discuss preliminary findings and any identified issues with relevant stakeholders 4.2 Source additional information required to clarify aspects of findings and issues 4.3 Prepare recommendations for actions to improve digital strategy |
| 5. Document and distribute outcomes and recommendations of review | 5.1 Prepare a draft report of the outcomes, findings and recommendations of digital strategy review according to review plan 5.2 Distribute draft report to relevant stakeholders 5.3 Edit the report based on the feedback obtained 5.4 Proofread the report in preparation for distribution 5.5 Present final report and obtain approval from authorised stakeholders 5.6 Distribute final report to relevant stakeholders according to review plan |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|---|
| Reading | <ul style="list-style-type: none"> Identifies, interprets, analyses or reviews complex texts from various sources to determine, organisational operations, specific requirements and responsibilities Checks documents for accuracy of content, grammar, spelling and punctuation |

| SKILL | DESCRIPTION |
|-------------------------|---|
| Writing | <ul style="list-style-type: none">• Collates and compiles results of research and analysis using appropriate technical language and organisational formats• Develops materials to convey information, requirements or recommendations using language and structure appropriate to the audience• Composes and edits texts, selecting appropriate vocabulary and structure for audience and purpose |
| Self-management | <ul style="list-style-type: none">• Responsible for following policies, procedures and legislative requirements |
| Planning and organising | <ul style="list-style-type: none">• Plans, develops, implements and monitors processes for reviewing digital strategy performance |
| Technology | <ul style="list-style-type: none">• Uses digital technologies and systems safely, legally and ethically to access, store and share information |

Unit Mapping Information

No equivalent unit. New unit.

Supersedes but is not equivalent to:

- BSBITA611 Configure and optimise customer contact technology
- BSBITB801 Implement advanced electronic technologies.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTEC601 Review organisational digital strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- review and develop and distribute recommendations relating to the digital strategy of an organisation or work area.

In the course of the above, the candidate must:

- develop a review plan including:
 - preparation of a review methodology
 - prepare and submit final report for approval and implementation.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of organisational policies and procedures, and objectives
- digital strategy review methodologies
- features of review plans, methodology and criteria
- sources of relevant digital strategy information
- methods of analysis of review information
- format and content of digital strategy report
- common recommendations for actions to improve digital strategy
- methods of distribution of the final review report.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- relevant standards, laws, regulations, industry and organisational codes and standards
- workplace equipment and resources relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTWK201 Work effectively with others

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to work cooperatively with others and deal effectively with issues, problems and conflict.

The unit applies to individuals who perform a range of routine tasks in a team environment and use a basic knowledge of teamwork in a defined context, under direct supervision or with limited individual responsibility.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Teamwork and Relationships

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop effective workplace relationships | 1.1 Identify individual responsibilities in relation to workgroup members 1.2 Clarify individual and workgroup responsibilities with work team 1.3 Participate in informal meetings and information sharing with workgroup 1.4 Request and apply feedback from supervisor on individual practices |
| 2. Improve workgroup processes | 2.1 Support team members to meet workgroup goals 2.2 Contribute to workgroup goals and tasks according to organisational requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 2.3 Share work-related information with workgroup according to organisational policies and procedures 2.4 Plan strategies for team performance improvement with workgroup |
| 3. Resolve issues, problems and conflict | 3.1 Identify advantages of differences in values and beliefs between workgroup members 3.2 Respond to any linguistic and cultural differences in communication styles according to legislation, organisational policies and procedures and ethical standards 3.3 Identify potential workgroup issues, problems and conflicts encountered in the workplace 3.4 Seek assistance from supervisor to address problems and conflicts that arise 3.5 Suggest possible ways of dealing with identified workplace issues |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information to determine task requirements |
| Writing | <ul style="list-style-type: none"> Completes required documentation using organisational formats Composes simple documents for others to read |
| Oral Communication | <ul style="list-style-type: none"> Presents information and seeks advice using language and features appropriate to audience Participates in discussions using listening and questioning to elicit views of others and to clarify or confirm understanding |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies responsibilities of own role and follows explicit and implicit organisational protocols and procedures |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate communication practices when seeking or sharing information Establishes and builds rapport and relationships with others to foster a culture of respect and cooperation in communications Listens to the ideas of others and considers their needs |
| Planning and organising | <ul style="list-style-type: none"> Plans and organises work commitments to ensure deadlines and objectives are met |

Unit Mapping Information

Supersedes and is equivalent to BSBWOR203 Work effectively with others.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTWK201 Work effectively with others

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- work with a group to achieve an objective on at least two occasions and address at least one identified problem or conflict on each occasion.

In the course of the above, the candidate must:

- distinguish individual responsibilities from workgroup responsibilities
- demonstrate the ability to:
 - support team members
 - communicate according to the cultural and linguistic requirements of the individual
 - act on constructive feedback
 - use communication channels to share information
 - cooperate and contribute to team goals
 - identify improvement opportunities
- identify problems and conflicts and address them according to organisational and ethical policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational and ethical standards, policies and procedures that relate to own work role
- team responsibilities and duties and their relationship to individual responsibilities and duties
- organisational policies and procedures relating to workplace discrimination and bullying
- personal values and beliefs including their importance in the development of relationships
- communication channels used to communicate in work teams including:
 - team meetings

- one-on-one interactions with individual team members
- emails
- instant messaging
- calls
- key problems and conflicts arising in workgroup contexts
- methods of resolving team problems including referral to relevant organisational personnel
- conflict resolution techniques.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace discrimination and bullying legislation
- organisational and ethical standards, policies and procedures for working with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTWK301 Use inclusive work practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to recognise and interact productively with diverse groups of individuals in the workplace. It covers responding to and working effectively with individual differences that might be encountered during the course of work.

The unit applies to individuals who work in a variety of contexts where they will be expected to interact with diverse groups of individuals. They may also provide some leadership and guidance to others and have some limited responsibility for the output of others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Teamwork and Relationships

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish practices that support individual differences in the workplace | 1.1 Identify individual differences in colleagues, clients and customers 1.2 Identify organisational policies and procedures relating to inclusive work practices 1.3 Assist relevant personnel in developing plan for incorporating inclusive practices in work tasks |
| 2. Work effectively with individual differences | 2.1 Document developed knowledge, skills and experience 2.2 Support colleagues and share specific skills with other team members and clients 2.3 Identify and implement inclusive work practices to demonstrate |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|--|
| | value of diversity in the workplace 2.4 Modify verbal and non-verbal communication to accommodate individual differences |
| 3. Assess use of inclusive practices | 3.1 Seek feedback on inclusive practices from supervisor 3.2 Evaluate feedback and identify opportunities for improvement 3.3 Incorporate feedback and make improvements to work practices according to legislative requirements and enterprise guidelines |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|-------------------------|---|
| Reading | <ul style="list-style-type: none"> Evaluates textual information to determine regulatory requirements and internal policies |
| Writing | <ul style="list-style-type: none"> Records key information related to the outcomes of the job, using appropriate vocabulary and style Varies writing style to meet requirements of audience and purpose |
| Oral Communication | <ul style="list-style-type: none"> Adjusts tone, speech and pace to suit verbal interactions Selects vocabulary appropriate to the audience |
| Teamwork | <ul style="list-style-type: none"> Identifies and takes steps to follow accepted communication practices and protocols Contributes to work group activities using accepted conventions |
| Planning and organising | <ul style="list-style-type: none"> Plans and implements routine tasks according to directions |

Unit Mapping Information

Supersedes and is equivalent to BSBDIV301 Work effectively with diversity.

Supersedes but is not equivalent to:

- BSBEDU304 Assist with the provision of pastoral care services to international students
- BSBFLM313 Apply language, literacy and numeracy to support others in the workplace
- BSBFLM314 Mentor others in the workplace to support their language, literacy and numeracy skill development.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTWK301 Use inclusive work practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use at least two different inclusive work practices
- work with a diverse group of individuals to achieve work outcomes on at least two occasions.

In the course of the above, the candidate must:

- contribute to developing a plan for incorporating inclusive practices in work tasks, according to legislative requirements and organisational policies and procedures
- adjust language and behaviour in interactions with diversity according to legislative and organisational requirements
- comply with workplace inclusivity regulations, standards and codes of practice.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- workplace anti-discrimination legislation and standards
- organisational policies and procedures relating to inclusive work practices
- major groups in the workplace and community, as defined by cultural, religious and other traditions and practices
- reasonable adjustments that facilitate participation by people with a disability
- the value of workplace diversity and inclusion in terms of:
 - the ability of an organisation to attract talent
 - employee satisfaction
 - creativity and innovation in the workplace
 - an organisation's financial performance.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, standards and codes of practice for working with diversity
- organisational diversity policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTWK401 Build and maintain business relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to establish, develop and maintain effective work relationships and networks through relationship building and negotiation skills required by workers. These workers may be within an organisation as well as freelance or contract workers.

The unit applies to individuals with a broad knowledge of networking and negotiation who contribute to creating solutions to unpredictable problems. They may have responsibility for and provide guidance to others.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Teamwork and Relationships

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish business relationships | 1.1 Identify business development and networking objectives of the organisation and own role 1.2 Determine networking opportunities according to identified objectives and organisational policies and procedures 1.3 Confirm communication channels for information exchange with business contacts 1.4 Engage with business contacts using written and verbal communication to promote business opportunities |
| 2. Maintain business | 2.1 Use communication techniques to establish rapport with |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| relationships | business contacts 2.2 Identify barriers to business development opportunities 2.3 Use problem-solving techniques to negotiate solutions to identified situations 2.4 Seek specialist advice in the development of contacts, as required |
| 3. Build and improve business relationships | 3.1 Develop strategies to represent and promote organisational interests to contacts 3.2 Participate in formal and informal networks that promote the organisation 3.3 Communicate issues regarding relationships in writing and verbally to organisational personnel 3.4 Seek and respond to feedback from management on the quality of relationships with business contacts |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Learning | <ul style="list-style-type: none"> Seeks opportunities to develop and extend expertise and identify areas for professional improvement |
| Reading | <ul style="list-style-type: none"> Sources and analyses information to establish networks that consistently promotes business opportunities |
| Writing | <ul style="list-style-type: none"> Uses appropriate vocabulary, layout and grammatical structure to convey ideas and information |
| Oral Communication | <ul style="list-style-type: none"> Uses persuasive language and appropriate non-verbal features to achieve mutually acceptable outcomes Uses active listening and questioning techniques to confirm understanding |
| Initiative and enterprise | <ul style="list-style-type: none"> Identifies and adheres to organisational policies and procedures |
| Teamwork | <ul style="list-style-type: none"> Looks for ways to establish connections and build genuine understanding with a diverse range of people Cultivates relationships with people with the knowledge, skills and influence to get things done or provide support |

| SKILL | DESCRIPTION |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">• Takes responsibility for planning, sequencing and implementing tasks required to build and maintain networks• Uses analytical processes to identify problems, gather relevant information, evaluate options and determine solutions |

Unit Mapping Information

Supersedes and is equivalent to BSBREL401 Establish networks.

Supersedes but is not equivalent to:

- BSBREL402 Build client relationships and business networks
- BSBREL403 Implement international client relationship strategies
- BSBSMB411 Manage specialist external advisory services.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTWK401 Build and maintain business relationships

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- communicate with others to build and maintain at least two different business relationships.

In the course of the above, the candidate must:

- promote professional business relationship using written and verbal communication techniques
- identify methods to improve business relationships
- participate in formal and informal networking opportunities that promote the business.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- strategies for establishing and maintaining business relationships
- methods of engaging with business contacts including through participation in professional networks and associations
- relevant networks, organisations, agencies, associations or individuals
- principles and techniques needed to negotiate positive outcomes
- organisational policies, plans and procedures relevant to business relationships
- methods for obtaining feedback on business relationships.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documentation and resources

- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTWK501 Lead diversity and inclusion

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead diversity for a work area. It covers implementing the organisation's diversity policy, fostering diversity within the work team and promoting the benefits of a diverse workplace.

The unit applies to individuals who direct the work of others in teams of variable sizes. They may work with staff from different cultures, races, religions, generations, or other forms of difference in any industry context.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Teamwork and Relationships

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review diversity policy | 1.1 Locate and review organisational diversity policy 1.2 Identify application of diversity policy in work area 1.3 Assess currency and efficacy of diversity policy 1.4 Provide feedback and suggestions for improvement of organisational diversity policy 1.5 Revise diversity policy and incorporate improvements |
| 2. Foster respect for diversity in the work team | 2.1 Identify training needs to promote respect for difference in personal interactions 2.2 Identify staff struggling to work with diversity and implement |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------------|--|
| | measures to support working with diversity 2.3 Develop processes to demonstrate benefits of working with various diverse groups 2.4 Address workplace diversity complaints according to organisational policies and procedures |
| 3. Promote the benefits of diversity | 3.1 Promote organisational workforce diversity in external forums 3.2 Identify role of diversity in gaining a competitive advantage for the organisation 3.3 Support organisational efforts to champion diversity |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates complex texts to determine particular diversity requirements |
| Writing | <ul style="list-style-type: none"> Collates ideas and information from various sources Prepares factual and informative documentation to suit purpose and audience Records investigation findings according to organisational and legislative requirements |
| Oral Communication | <ul style="list-style-type: none"> Presents information and opinions using language and non-verbal features appropriate to audience Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Initiative and enterprise | <ul style="list-style-type: none"> Takes responsibility for following policies, procedures and legislative requirements Seeks to improve policies and procedures to better meet organisational goals |
| Teamwork | <ul style="list-style-type: none"> Selects, implements and seeks to improve protocols governing communications to clients and co-workers in a range of work contexts Collaborates with others to achieve shared goals Interacts effectively with people from diverse backgrounds |
| Planning and organising | <ul style="list-style-type: none"> Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others Uses analytical skills to decide on appropriate application of diversity policy in a range of complex situations |

| | |
|--|---|
| | <ul style="list-style-type: none">Investigates new and innovative ideas as a means to continuously improve work practices and processes |
|--|---|

Unit Mapping Information

Supersedes and is equivalent to BSBDIV501 Manage diversity in the workplace.

Supersedes but is not equivalent to BSBDIV601 Develop and implement diversity policy.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTWK501 Lead diversity and inclusion

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- lead diversity and inclusion initiatives for an organisation or work area.

In the course of the above, the candidate must:

- implement strategies to improve awareness of challenges experienced by individuals from diverse groups in the work team
- follow procedures for handling complaints or harassment allegations
- promote the benefits of diversity to others both internally and externally.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational diversity policy
- organisational processes for feedback on policy
- benefits and competitive advantage of a diverse workforce
- organisational formal and informal complaints procedures
- relevant current legislation regarding:
 - age discrimination
 - disability discrimination
 - racial discrimination
 - sex discrimination
 - human rights
 - equal opportunity.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- legislation, regulations and codes of practice for managing diversity
- workplace diversity policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTWK502 Manage team effectiveness

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to lead teams in the workplace and to actively engage with the management of the organisation.

The unit applies to individuals working at a managerial level who lead and build a positive culture within their work teams. At this level, work will normally be carried out using complex and diverse methods and procedures requiring the exercise of considerable discretion and judgement. It will also involve using a range of problem solving and decision-making strategies.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Teamwork and Relationships

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish team performance plan | 1.1 Identify team purpose, roles, and responsibilities according to organisational and task objectives 1.2 Develop performance plans with expected outcomes, key performance indicators (KPIs) and goals for work team 1.3 Support team members in meeting expected performance outcomes |
| 2. Develop and facilitate team cohesion | 2.1 Develop strategies for facilitating team member input into planning, decision making and operational aspects of team tasks 2.2 Develop or modify policies and procedures for promoting team |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------|--|
| | <p>member accountability for personal work and team tasks</p> <p>2.3 Provide feedback to team members on team effort and contributions</p> <p>2.4 Develop processes for identifying and addressing issues, concerns and problems identified by team members</p> |
| 3. Facilitate teamwork | <p>3.1 Encourage team members to participate in and to take responsibility for team activities</p> <p>3.2 Support the team in identifying and resolving work performance problems</p> <p>3.3 Promote work team collaboration through individual behaviour</p> |
| 4. Liaise with stakeholders | <p>4.1 Establish and maintain open communication processes with relevant stakeholders</p> <p>4.2 Communicate information from line management to the team</p> <p>4.3 Communicate and follow-up unresolved issues, concerns and problems raised by team members with line management</p> <p>4.4 Address unresolved issues, concerns and problems raised by stakeholders</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Analyses and interprets textual information from the organisation's policies, goals and objectives to establish team goals or to determine corrective action |
| Writing | <ul style="list-style-type: none"> Prepares workplace documentation that communicates complex information clearly and effectively |
| Oral Communication | <ul style="list-style-type: none"> Engages in discussions or provides information using appropriate vocabulary and non-verbal features Uses listening and questioning techniques to confirm understanding and to engage the audience |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies how own role contributes to broader organisational goals Modifies or develops policies and procedures to achieve organisational goals |
| Teamwork | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders Uses interpersonal skills to gain trust and confidence of team and |

| | |
|-------------------------|--|
| | <p>provides feedback to others in forms that can be understood and used</p> <ul style="list-style-type: none">• Adapts personal communication style to build positive working relationships and to show respect for the opinions, values and particular needs of others |
| Planning and organising | <ul style="list-style-type: none">• Develops, implements and monitors plans and processes to ensure team effectiveness• Monitors and actively supports processes and development activities to ensure the team is focused on work outcomes• Plans for unexpected outcomes and implements creative responses to overcome challenges |

Unit Mapping Information

Supersedes and is equivalent to BSBWOR502 Lead and manage team effectiveness.

Supersedes but is not equivalent to:

- BSBMGT520 Plan and manage the flexible workforce
- BSBWRK409 Prepare for and participate in dispute resolution.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTWK502 Manage team effectiveness

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage the effectiveness of at least one work team.

In the course of the above, the candidate must:

- provide feedback to encourage, value and reward others
- model desired behaviour and practices
- encourage and foster shared understanding of purpose, roles and responsibilities
- support team to meet expected performance outcomes including providing formal and informal learning opportunities as needed
- develop performance plans with key performance indicators (KPIs), outputs and goals for individuals or the team which incorporate input from stakeholders
- communicate effectively with a range of stakeholders about team performance plans and team performance
- evaluate and take necessary corrective action regarding unresolved issues, concerns and problems raised by internal or external stakeholders.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- impacts of group dynamics on team performance
- methods of establishing team activities including communication processes
- strategies that can support team cohesion, participation and performance
- strategies for gaining consensus
- issue resolution strategies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace documents relevant to team task objectives.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTWK503 Manage meetings

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to manage a range of meetings including overseeing the meeting preparation processes, chairing meetings, organising the minutes and reporting meeting outcomes.

The unit applies to individuals employed in a range of work environments who are required to organise and manage meetings within their workplace. These individuals may work as senior administrative staff or may be individuals with responsibility for conducting and chairing meetings in the workplace.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Teamwork and Relationships

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for meetings | 1.1 Develop agenda according to meeting purpose 1.2 Establish and verify meeting requirements with relevant individuals 1.3 Contact and confirm meeting with participants according to organisational procedures 1.4 Provide meeting papers to participants according to task requirements |
| 2. Conduct meetings | 2.1 Chair meetings according to organisational requirements, agreed conventions for type of meeting and legal and ethical |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------|---|
| | requirements 2.2 Promote participation, discussion, problem solving and resolution of issues 2.3 Brief minute-taker on method for recording meeting notes |
| 3. Follow up meetings | 3.1 Review meeting minutes and edit, as required 3.2 Distribute and store minutes and other follow-up documentation within designated timelines, and according to organisational requirements 3.3 Report outcomes of meetings, as required, within designated timelines |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from complex texts including organisational policies and procedures |
| Writing | <ul style="list-style-type: none"> Addresses the context, purpose and audience when generating a range of texts Prepares notes using appropriate structure, and accurate spelling, grammar and punctuation Edits and corrects own work to ensure accuracy |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using appropriate style, tone and vocabulary for audience, context and purpose Listens for specific information during meetings Asks questions and listens to responses to clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Identifies and interprets numerical information related to timeframes |
| Enterprise and initiative | <ul style="list-style-type: none"> Identifies and responds to both explicit and implicit organisational procedures and protocols and legislative and regulatory requirements |
| Planning and organising | <ul style="list-style-type: none"> Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints Recognises and takes responsibility for addressing predictable problems in familiar work contexts |

Unit Mapping Information

Supersedes and is equivalent to BSBADM502 Manage meetings.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBTWK503 Manage meetings

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- manage a meeting on at least two occasions.

In the course of the above, the candidate must:

- apply conventions and procedures for meetings including:
 - developing and distributing agendas and papers
 - identifying and inviting meeting participants
 - organising and confirming meeting arrangements
 - conducting meeting
 - completing meeting-follow up actions
- follow relevant organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- meeting terminology, structures and arrangements
- responsibilities of the chairperson and key features of group dynamics in relation to managing meetings
- key features of options for meetings including face-to-face and virtual meetings
- methods for recording meeting notes including relevant organisational requirements and conventions for type of meeting
- organisational procedures and policies regarding meetings, chairing and minutes including identifying organisational formats for minutes and agendas.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures for managing meetings
- computers and relevant software.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBTWK601 Develop and maintain strategic business networks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

The unit describes the skills and knowledge required to establish professional relationships and networks to support organisational objectives.

The unit applies to individuals who hold significant accountability for the effective functioning and success of an organisation or work area. At this level, work will generally be carried out using complex and diverse methods and procedures requiring the exercise of considerable discretion and judgement, using a range of problem solving and decision-making strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Teamwork and Relationships

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan networking activities | 1.1 Identify potential business contacts according to networking objectives and organisational strategy 1.2 Evaluate and select potential business contacts 1.3 Plan subject matter of communication with identified businesses contacts 1.4 Evaluate methods for contacting identified business contacts |
| 2. Undertake networking activities | 2.1 Establish contact with identified business contacts 2.2 Communicate with relevant stakeholders the advantages of developing business relationship according to plan |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------|--|
| | 2.3 Confirm communication channels with relevant stakeholders for future correspondence |
| 3. Maintain networks | 3.1 Identify existing business relationships and assess strategic importance according to organisational objectives 3.2 Develop plan for maintaining strategic business relationships 3.3 Evaluate opportunities for collaboration with business contacts according to organisational strategy |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| SKILL | DESCRIPTION |
|---------------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from complex texts including organisational policies and procedures |
| Writing | <ul style="list-style-type: none"> Communicates relationships between ideas and information, matching style of writing to purpose and audience Researches, plans and prepares for business communication |
| Oral Communication | <ul style="list-style-type: none"> Participates in verbal exchanges using appropriate style, tone and vocabulary for audience, context and purpose Participates in discussions using listening and questioning to elicit the views of others and to clarify or confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Identifies and interprets numerical information relevant to organisational strategy |
| Enterprise and Initiative | <ul style="list-style-type: none"> Takes full responsibility for complying with organisational policies and procedures applicable to self and the organisation |
| Teamwork | <ul style="list-style-type: none"> Sequences and schedules complex activities, monitors implementation and manages relevant communication |
| Planning and organising | <ul style="list-style-type: none"> Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints Identifies and takes responsibility for addressing unpredictable problems in work contexts |

Unit Mapping Information

No equivalent unit. New unit.

Supersedes but is not equivalent to:

- BSBCMM501 Develop and nurture relationships
- BSBREL501 Build international client relationships
- BSBREL502 Build international business networks.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSB TW K601 Develop and maintain strategic business networks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop and maintain at least one strategic business network.

In the course of the above, the candidate must:

- identify methods for contacting potential business contacts including conferences, professional associations and business networking opportunities
- determine the value of establishing a shared business relationship
- initiate follow-up correspondence.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key features of organisational strategy
- common opportunities and risks associated with business collaboration
- methods for contacting potential business contacts applicable to the industry.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational strategy documents relevant to performance evidence
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS211 Contribute to the health and safety of self and others

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to work in a manner that is healthy and safe in relation to self and others, and to assist in responding to incidents. It covers following work health and safety (WHS) policies, procedures, instructions and requirements; and participating in WHS consultative processes.

The unit applies to those who require a basic knowledge of WHS to carry out own work in a defined context, under direct supervision or with some individual responsibility, in a range of industry and workplace contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Operate safely in own work environment | 1.1 Identify organisational WHS policies and procedures that apply to own work setting 1.2 Carry out work tasks according to WHS instructions 1.3 Carry out pre-start systems and equipment checks under supervision and according to organisational policies and procedures 1.4 Participate in responding to incidents according to organisational policies and procedures |
| 2. Operate safely within requirements of own role | 2.1 Identify individuals and/or parties to whom queries and concerns about safety in the workplace should be directed 2.2 Identify existing and potential hazards relating to own role, and record and report them according to organisational policies and procedures 2.3 Identify and contribute to implementing WHS instructions and organisational policies and procedures specific to own work area 2.4 Identify and report incidents and injuries to required personnel according to organisational policies and procedures |
| 3. Participate in WHS consultative processes | 3.1 Contribute to workplace meetings, inspections, and other WHS consultative activities 3.2 Identify existing and potential WHS hazards and report them to designated persons according to organisational policies and procedures 3.3 Participate in actions to minimise or eliminate workplace hazards and to reduce risks |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|---|
| Reading | <ul style="list-style-type: none"> Identifies and interprets short and simple information in relation to WHS and incidents |
| Writing | <ul style="list-style-type: none"> Uses structure and language appropriate to audience and context when giving factual information |

| Skill | Description |
|----------------------------|--|
| Oral Communication | <ul style="list-style-type: none">• Uses language and non-verbal communication appropriate to audience and context in descriptions, opinions and explanations• Extracts meaning and main ideas from verbal descriptions, opinions and explanations |
| Navigate the world of work | <ul style="list-style-type: none">• Follows WHS legislative requirements under supervision and with assistance• Follows protocols and procedures relating to own role• Seeks assistance from others when WHS issues are beyond scope of immediate responsibilities |
| Get the work done | <ul style="list-style-type: none">• Plans, organises and implements routine tasks in order to optimise health and safety• Selects and implements actions from predetermined procedures |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS201 Contribute to health and safety of self and others.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS211 Contribute to the health and safety of self and others

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- actively participate in two different work activities that contribute to the health and safety of self and others
- identify and report at least one hazard to designated personnel.

During the above, the candidate must follow required procedures and instructions relating to work health and safety (WHS) and incidents.

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- organisational safety policies, procedures, instructions and requirements relating to own work role in relation to:
 - checking systems and equipment
 - conducting routine work operations
 - personal protective equipment (PPE)
 - recording existing and potential WHS issues
 - responding to and reporting incidents and injuries
 - responding to fires and incidents
- meaning of commonly used hazard signs and safety symbols
- duty holder responsibilities, as specified in WHS laws, including:
 - self and co-workers
 - persons conducting a business or undertaking (PCBUs)
 - officers
 - others in the workplace

- distinction between hazards and risks
- WHS hazards that may be present in the workplace, including the harm they can cause and how this harm occurs
- process of hazard identification and risk control.

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, standard operating procedures, and work instructions covered in the knowledge evidence
- WHS laws relevant to performance evidence requirements
- opportunities for interaction with others
- workplace equipment and resources required for the performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS307 Apply knowledge of WHS laws in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to understand work health and safety (WHS) laws, and comply with them in one's own workplace.

The unit applies to those who contribute to compliance with WHS laws as part of their WHS responsibilities, which are in addition to their main duties.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| 1. Identify WHS legal and compliance framework as it applies to the workplace | <p>1.1 Identify and access current standards and WHS laws relevant to the workplace, occupation and industry</p> <p>1.2 Apply knowledge of relationship between WHS laws and related documentation to assist in identifying WHS legislative requirements in the workplace</p> <p>1.3 Identify consequences of non-compliance with WHS laws and organisational WHS policies, procedures, processes and systems</p> <p>1.4 Identify duty holders and their role in the workplace</p> <p>1.5 Identify legal obligations and duties about who to consult with regarding training of workers and health and safety representatives</p> |
| 2. Contribute to WHS legislative compliance | <p>2.1 Assist in monitoring workplace compliance with WHS laws according to organisational policies and procedures</p> <p>2.2 Contribute to ensuring that workplace complies with WHS laws</p> <p>2.3 Identify and report non-compliance with WHS laws to relevant stakeholders according to organisational policies and procedures</p> <p>2.4 Identify limits of own expertise and legal duties, and access help and advice when required</p> |
| 3. Maintain current knowledge of WHS laws and publications | <p>3.1 Identify and access sources to keep up to date with WHS laws and WHS-related publications within scope of own role</p> <p>3.2 Communicate information about relevant legislative changes and publications to others according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------|---|
| Learning | <ul style="list-style-type: none">Identifies and evaluates information from sources to update knowledge |

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none">Interprets a range of textual information to determine regulatory and procedural requirements, and associated necessary actions |
| Writing | <ul style="list-style-type: none">Documents WHS information in a sequential manner using required format, correct grammar and industry-specific language |
| Oral communication | <ul style="list-style-type: none">Provides information and advice using language appropriate to audience and contextUses listening and questioning to clarify and confirm understanding |
| Navigate the world of work | <ul style="list-style-type: none">Follows policies, procedures and legislative requirements relevant to own role |
| Interact with others | <ul style="list-style-type: none">Selects appropriate communication protocols and conventions to provide and seek information |
| Get the work done | <ul style="list-style-type: none">Plans, sequences and prioritises tasks and activities to support compliance with WHS legislative requirementsUses main features and functions of technology to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS302 Apply knowledge of WHS legislation in the workplace.

Links

Companion Volume Implementation Guides are available from VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS307 Apply knowledge of WHS laws in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- identify and apply at least two different standards or work health and safety (WHS) laws relevant to own work role, workplace and industry.

During the above, the candidate must:

- communicate WHS information to others
- refer any identified non-compliances with WHS laws to responsible persons or authorities
- seek advice from relevant stakeholders if any non-compliance matters are identified that are outside own expertise and legal duties.
-

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS legislative duties of self and others, including limits of own expertise
- organisational WHS policies, procedures, processes and systems for:
 - monitoring workplace compliance with WHS laws
 - identifying and reporting non-compliance with WHS laws
 - communicating WHS-related information
- requirements of commonwealth and state/territory WHS laws, standards and guidance material, and publications relevant to own work role, workplace and industry
- obligations and duties relating to consultation regarding training of workers, and health and safety representatives, including who must be consulted
- consequences of non-compliance with WHS laws, related documentation and organisational WHS policies, procedures, processes and systems

- individuals and duty holders to access for advice and accountability about WHS compliance
- sources of information about compliance with legislation.

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, procedures and plans relating to compliance requirements specified in the performance evidence
- WHS laws, licensing requirements and standards relevant to the work of the unit
- guidance materials and alerts issued by the relevant WHS regulator
- workplace equipment and resources required for the performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS308 Participate in WHS hazard identification, risk assessment and risk control processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to participate in the processes of work health and safety (WHS) hazard identification, risk assessment and risk control. It includes participating in worker consultation and support to contribute to a healthy and safe workplace.

The unit applies to those who assist with identifying workplace hazards and assessing and controlling WHS risks as part of their WHS responsibilities, which are in addition to their main duties.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Participate in WHS hazard identification in the workplace | <p>1.1 Participate in selecting hazard identification methods for the workplace according to organisational policies and procedures</p> <p>1.2 Use selected methods to identify, report and record hazards according to organisational policies and procedures, standards and WHS laws</p> <p>1.3 Provide information and assistance to required personnel during hazard identification process</p> |
| 2. Participate in WHS risk assessment | <p>2.1 Participate in selecting suitable risk assessment methods for the workplace according to organisational policies and procedures</p> <p>2.2 Assess and record risks using selected methods according to organisational procedures, standards and WHS laws</p> <p>2.3 Provide information and assistance to required personnel during risk assessment process</p> |
| 3. Contribute to developing and implementing WHS control measures | <p>3.1 Obtain organisation records of the outcomes of hazard identifications and risk assessments, and use them to participate in developing risk control options</p> <p>3.2 Identify duty holders according to WHS laws and organisational WHS policies, procedures, processes and systems</p> <p>3.3 Participate in selecting risk control options using criteria agreed to by work team, and according to organisational policies, procedures, processes and systems</p> <p>3.4 Identify and report factors impeding successful implementation of selected risk control options to determine potential control measures to be implemented</p> <p>3.5 Review and document potential control measures for compliance with relevant WHS laws</p> <p>3.6 Contribute to developing a risk control implementation plan according to the hierarchy of control measures</p> <p>3.7 Provide written information to individuals and duty holders to facilitate implementation of reviewed control measures</p> |
| 4. Contribute to consultative arrangements for hazard | 4.1 Assist engaging work team in hazard identification and risk assessment according to organisational WHS |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| identification and risk assessment activities | <p>consultation and participation policies, procedures and processes</p> <p>4.2 Respond to issues raised according to organisational procedures and processes</p> <p>4.3 Develop plan to encourage others to participate in hazard identification and risk assessment activities, according to organisational policies and procedures</p> |
| 5. Contribute to consultative arrangements for implementing control measures | <p>5.1 Assist with implementing consultative processes that engage work team in developing and implementing control measures, according to organisational WHS consultation and participation policies, procedures and processes</p> <p>5.2 Respond to issues raised according to organisational policies and procedures for issue resolution</p> <p>5.3 Promote worker participation in arrangements for implementing control measures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and identifies information from WHS laws, workplace policies, procedures and records |
| Writing | <ul style="list-style-type: none"> Uses structure and language appropriate to audience and context in plans, reports and general advice |
| Oral communication | <ul style="list-style-type: none"> Presents information and assistance using appropriate industry-specific vocabulary Uses listening and questioning to clarify and confirm understanding |
| Navigate the world of work | <ul style="list-style-type: none"> Follows regulatory responsibilities, and organisational policies and procedures in relation to WHS responsibilities Keeps up to date with changes to WHS laws, and organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Identifies what to communicate and to whom in a range of contexts Cooperates with others as part of WHS activities and contributes to specific activities requiring joint responsibility and accountability Shares information and resources, offers assistance voluntarily and provides feedback when requested Plays an active role in group discussions, paying attention to |

| Skill | Description |
|-------------------|--|
| | perspectives of others and encouraging participation |
| Get the work done | <ul style="list-style-type: none">Plans and implements tasks to achieve required outcomesUses decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria in the WHS risk-management process |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS303 Participate in WHS hazard identification, risk assessment and risk control.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS308 Participate in WHS hazard identification, risk assessment and risk control processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit and, on at least two occasions, to:

- participate in selecting and using required methods to identify, report and record hazards
- assess and record risks for identified hazards
- promote and support worker consultation and participation in hazard identification and risk assessment
- participate in developing, selecting and implementing risk control options and plans for identified hazards.
-

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- work health and safety (WHS) legislative requirements, regulations, codes of practice and standards relating to:
 - WHS hazard identification, risk assessment and risk control
 - WHS hazard communication, consultation and participation
 - identifying duty holders
 - recordkeeping
 - specific hazard identification, risk assessment and control methods
- internal and external sources of WHS information and data, and procedures for accessing them
- concept of hazards, risks and risk factors
- basic principles of incident causation and injury processes
- WHS organisational policies and procedures relating to identifying hazards, and assessing and controlling risks:

- WHS hazards that may be present in the workplace, the harm they can cause and how this harm occurs
- types of hazard and risk registers
- responding to WHS issues, including risk control options for different hazards and work situations, and suitable risk assessment methods
- workplace communication processes for reporting and recording, and plans for sharing information about hazard identification, risk assessment and risk control.
-

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, standard operating procedures and plans required for the performance evidence
- WHS laws relevant to hazard identification, risk assessment and risk control
- relevant WHS data files
- opportunities for interaction with others
- workplace equipment and resources required to demonstrate the performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS309 Contribute effectively to WHS communication and consultation processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to work health and safety (WHS) communication and consultation in the workplace. It involves communicating WHS information to required personnel, and taking appropriate follow-up action to assist in ensuring that communication and consultation processes are effective and conducive to others in the workplace who raise WHS issues.

The unit applies to those who contribute to WHS communication and consultation as part of their work health and safety responsibilities, which are in addition to their main duties.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Participate in establishing consultation processes | <p>1.1 Contribute to selecting WHS consultation and communication methods aligned to organisational policies and procedures, and compliant with WHS legislative requirements</p> <p>1.2 Identify and record key stakeholders according to WHS laws and related documentation</p> <p>1.3 Research and collate information on organisational WHS obligations relating to communication and consultation with required personnel</p> <p>1.4 Assist with any required revisions to consultation and communication methods according to organisational policies and procedures</p> <p>1.5 Participate in consultation with required personnel to agree any proposed consultation and communication methods</p> |
| 2. Contribute to WHS consultation | <p>2.1 Contribute to facilitating WHS consultation and participation processes according to WHS laws</p> <p>2.2 Identify and report barriers to effective WHS consultation and participation processes to required personnel according to organisational policies and procedures</p> <p>2.3 Make suggestions that could assist in removing identified barriers to effective WHS consultation and participation processes, according to organisational policies and procedures</p> <p>2.4 Identify, record and communicate to others, the duties, rights and responsibilities of required personnel in the consultation process</p> |
| 3. Consult and communicate effectively with required personnel | <p>3.1 Identify appropriate forms of communication for required individuals and/or parties</p> <p>3.2 Convey WHS information to required personnel in plain language and according to organisational policies and procedures</p> <p>3.3 Participate in confirming that required personnel understand WHS information, instructions and signs</p> |
| 4. Raise WHS issues with required personnel | <p>4.1 Raise relevant WHS issues in meetings and support others to do so</p> <p>4.2 Record and communicate WHS discussions and their outcomes according to organisational policies and procedures</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|---|
| | 4.3 Follow up meeting outcomes according to own job role, and organisational policies and procedures 4.4 Communicate WHS-related outcomes of meetings to required individuals and/or parties |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none">Interprets a range of textual information to determine regulatory and procedural requirements, and associated necessary actions |
| Writing | <ul style="list-style-type: none">Records key information in a sequential manner using required format, correct grammar and industry-specific vocabulary |
| Oral Communication | <ul style="list-style-type: none">Presents information using language and non-verbal communication appropriate to audience and contextUses questioning and listening techniques to obtain feedback from others and to resolve issues |
| Navigate the world of work | <ul style="list-style-type: none">Follows policies, procedures and legislative requirements relevant to own role |
| Interact with others | <ul style="list-style-type: none">Selects and uses appropriate conventions and protocols when communicating with others in a range of work contextsUses appropriate interpersonal skills to promote contributions and encourage ideas from others |
| Get the work done | <ul style="list-style-type: none">Sequences and schedules activities, and assists with their implementation and communicationIdentifies barriers to consultation and applies problem-solving processes to assist with determining possible solutionsUses main features and functions of digital tools to access information and communicate effectively |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS304 Participate effectively in WHS communication and consultation processes.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS309 Contribute effectively to WHS communication and consultation processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to two different work health and safety (WHS) communication and consultation processes.

During the above, the candidate must:

- communicate WHS information to others
- raise WHS issues in meetings and follow up on outcomes
- take appropriate actions to assist with removing any barriers to communication and consultation processes identified during above processes
- support others to raise relevant WHS issues.
-

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- purpose of organisational WHS policies, procedures, processes and systems
- organisational WHS obligations relating to communication and consultation
- commonwealth and state/territory WHS laws and publications relating to:
 - identifying and recording key stakeholders
 - WHS communication and consultation processes
- organisational policies and procedures relating to:
 - consultation and communication methods, and processes for revising them
 - addressing barriers to effective WHS consultation and participation processes, including barrier reporting protocols
 - recording and communicating WHS discussions

- elements of WHS communication and consultation:
 - potential barriers to WHS consultation and participation processes, and methods to overcome them
 - roles and responsibilities of WHS personnel
 - how the consultation process influences and is related to workplace information management procedures, processes and systems
 - methods to engage others with workplace procedures, and information sourcing and sharing.
-

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, standard operating procedures, plans and procedures with information about compliance requirements required to demonstrate the performance evidence
- required WHS laws and data files to contribute to WHS communication and consultation processes
- opportunities for interaction with others
- workplace equipment and resources required for the performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS310 Contribute to WHS issue-resolution processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to work health and safety (WHS) issue-resolution processes, and to communicate their outcomes.

It applies to individuals who contribute to the resolution of WHS issues in the workplace as part of their WHS responsibilities, which are in addition to their main duties.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to the | 1.1 Identify relevant standards, WHS laws and organisational |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| development of WHS issue-resolution processes | <p>policies, procedures, processes and systems that apply to the resolution of WHS issues</p> <p>1.2 Review sufficiency of existing issue-resolution processes and compliance with WHS laws and related documentation</p> <p>1.3 Identify participants in the WHS issue-resolution process</p> <p>1.4 Assist with identifying and documenting the legal rights, duties and responsibilities of relevant individuals and/or parties</p> <p>1.5 Assist with identifying techniques and strategies that can be used to resolve WHS issues</p> |
| 2. Contribute to the assessment of WHS issues | <p>2.1 Participate in identifying and assessing WHS issues within scope of own role</p> <p>2.2 Provide support and advice to participants in WHS issue-resolution process as required and according to organisational policies, procedures, processes and systems</p> <p>2.3 Assess and identify appropriate timeframes for the resolution of WHS issues, seeking assistance where appropriate</p> <p>2.4 Contribute to the documentation of WHS issues</p> <p>2.5 Seek feedback from required stakeholders to improve WHS issue-resolution processes</p> |
| 3. Assist with communicating outcomes of WHS issue-resolution processes | <p>3.1 Analyse communication methods to determine most suitable method for distributing outcomes of WHS issue-resolution processes according to organisational policies, procedures, processes and systems</p> <p>3.2 Assist with distributing the outcomes of WHS issue-resolution processes to relevant stakeholders according to selected communication method</p> <p>3.3 Contribute to keeping records of WHS issue resolution-processes and outcomes</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------|---|
| Reading | <ul style="list-style-type: none"> Interprets relevant sections of WHS laws, workplace policy and procedures |

| Skill | Description |
|----------------------------|--|
| | <ul style="list-style-type: none"> Interprets WHS documentation relevant to own role |
| Writing | <ul style="list-style-type: none"> Uses structure and language appropriate to audience and context in plans, summaries, reports and advice |
| Oral communication | <ul style="list-style-type: none"> Presents information, provides assistance and engages in discussions using language and non-verbal communication appropriate to audience and context Uses listening and questioning to clarify and confirm understanding |
| Navigate the world of work | <ul style="list-style-type: none"> Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to WHS role Keeps up to date with changes to WHS laws and organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Identifies what to communicate and to whom in an issue-resolution process Cooperates with others as part of WHS issue-resolution activities and contributes to specific activities requiring joint responsibility and accountability Plays an active role in group discussions and pays attention to perspectives of others when trying to reach agreement When unable to resolve an issue, seeks advice and assistance according to organisational policies and procedures |
| Get the work done | <ul style="list-style-type: none"> Plans and implements tasks to achieve required outcomes Uses technology and programs to assist with planning, implementing and tracking progress Uses decision-making processes, setting or clarifying goals, gathering information and identifying and evaluating choices against a set of criteria in selecting means of communication |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS305 Contribute to WHS issue resolution.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS310 Contribute to WHS issue-resolution processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- on at least two occasions, contribute to a WHS issue-resolution process in a work area.

During the above, the candidate must contribute to:

- identifying standards, WHS laws, and organisational policies and procedures relevant to the process
- identifying possible participants and their roles and responsibilities
- using suitable methods to communicate with participants in the issue-resolution process
- providing support to others about WHS issue-resolution tools, techniques and strategies
- recording WHS issues and outcomes.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- sources of WHS information and data, and how to access them
- standards and legislative requirements applicable to WHS issue resolution, including:
 - information provision
 - data collection
 - consultation
 - reporting
 - recordkeeping
 - privacy and confidentiality
- organisational policies, procedures, processes and systems relating to WHS agreements and issue resolution

- roles and responsibilities of individuals and/or parties involved in performance evidence under WHS laws
- WHS issue-resolution tools, techniques and strategies.
-

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, procedures and plans
- relevant standards, WHS laws, licensing requirements
- workplace equipment and resources required for the performance evidence
- opportunities for interaction with others
- case studies and, where possible, actual workplace situations requiring issue resolution.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS311 Assist with maintaining workplace safety

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to assist with implementing and monitoring an organisation's work health and safety (WHS) policies, procedures and programs as part of a small work team.

The unit applies to individuals who have roles in assisting with maintaining workplace safety in an organisation. Individuals closely monitor aspects of work associated with the safe delivery of products and services, and they contribute to influencing safety in the workplace.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|--|
| <i>Elements describe the</i> | <i>Performance criteria describe the performance needed to</i> |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>essential outcomes.</i> | <i>demonstrate achievement of the element.</i> |
| 1. Assist with incorporating WHS policies and procedures into work team processes | 1.1 Identify health and safety requirements of work team according to applicable WHS laws 1.2 Assist with explaining organisational WHS policies, procedures, programs and legislative requirements to required personnel 1.3 Assist with explaining hazard identification and risk assessment outcomes to required personnel |
| 2. Contribute to consultative arrangements for managing WHS | 2.1 Assist with implementing consultative processes designed to engage work team in managing WHS 2.2 Respond to WHS issues in a timely manner and according to organisational policies and procedures for issue resolution 2.3 Encourage others to participate in arrangements for managing WHS 2.4 Assist in engaging with required personnel to identify and implement improvements in response to WHS feedback |
| 3. Contribute to organisational procedures for providing WHS training | 3.1 Identify WHS training needs of the work team and report to relevant stakeholders 3.2 Identify strategies and opportunities for developing work team's WHS competence and report to relevant stakeholders 3.3 Provide assistance to work team members to support the effective development of their WHS competence |
| 4. Participate in identifying hazards, and assessing and controlling risks for the work area | 4.1 Identify hazards in the work area and report to relevant stakeholders according to organisational policies and procedures, and WHS legislative requirements 4.2 Assist with implementing processes designed to control risks using the hierarchy of control measures according to organisational procedures and WHS legislative requirements 4.3 Identify and document inadequacies in existing risk control measures according to organisational policies and procedures, the hierarchy of control measures and WHS legislative requirements 4.4 Report inadequacies in existing risk control measures to relevant stakeholders 4.5 Complete and maintain WHS incident records in the work area according to organisational procedures and WHS legislative requirements |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets WHS legislative and organisational documentation Applies appropriate strategies to construct meaning from WHS legislative and organisational documentation |
| Writing | <ul style="list-style-type: none"> Documents WHS information using required format and industry specific vocabulary |
| Oral communication | <ul style="list-style-type: none"> Presents information using language and non-verbal communication appropriate to audience and context Uses questioning and active listening to confirm understanding |
| Navigate the world of work | <ul style="list-style-type: none"> Follows WHS policies, procedures and legislative requirements relevant to own role Keeps up to date with changes to WHS laws relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Selects appropriate communication protocols and conventions to provide information to others Collaborates with others to achieve joint outcomes Plays an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion Provides feedback to others in forms with which they can engage and respond |
| Get the work done | <ul style="list-style-type: none"> Sequences and schedules activities, monitors implementation and manages relevant communication Initiates standard procedures when responding to issues raised through consultation Uses feedback to participate in the identification and implementation of opportunities to improve arrangements for managing WHS issues |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS301 Maintain workplace safety.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS311 Assist with maintaining workplace safety

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- assist with implementing and monitoring at least three different organisational work health and safety (WHS) policies or procedures into a work team's processes.

During the above, the candidate must:

- assist with implementing and monitoring consultation about each policy or procedure according to legislative and organisational requirements
- identify opportunities to encourage work team to contribute to implementing improvements to each policy or procedure based on feedback received through consultation
- complete WHS documentation.

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- characteristics and composition of the work team
- procedures related to the following:
 - identifying hazards
 - assessing and controlling risks to health and safety, including the hierarchy of control measures
- organisational WHS policies and procedures, including those relating to:
 - risk management
 - fire
 - emergencies
 - evacuation
 - incident investigation

- reporting
- relevant legislation, regulations and codes of practice from all levels of government that impact on business operations, including those relating to:
 - WHS and environmental issues
 - equal opportunity
 - industrial relations
 - anti-discrimination
- WHS aspects of other organisational systems and procedures.

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and include access to:

- safety processes relevant to the area of work
- organisational policies and procedures, standard operating procedures and plans
- standards, WHS laws and licensing requirements
- opportunities for interaction with others
- workplace equipment and resources required for the performance evidence.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS331 Participate in identifying and controlling hazardous chemicals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to identify and control hazardous chemicals in the workplace. It requires knowledge of the potential hazards associated with chemicals and how to work safely with them. It involves supporting workplace safety by communicating information about hazardous chemicals using established consultation methods.

The unit applies to those who participate in identifying chemicals as part of their WHS responsibilities, which are in addition to their main duties. It applies to hazardous chemicals with the potential to harm human health, which may be solids, liquids or gases; pure substances or mixtures. When used in the workplace, these substances can generate vapours, fumes, dusts and mists.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Apply information relating to identifying hazardous chemicals | <p>1.1 Identify and follow WHS laws and guidance notes in relation to the safe use, handling, processing, storage, transportation, and disposal of hazardous chemicals used in the workplace</p> <p>1.2 Identify and follow safety data sheets (SDSs) and other guidance to determine the potential health effects of worker exposure to hazardous chemicals</p> <p>1.3 Identify and follow SDSs and other guidance to determine methods to control worker exposure to hazardous chemicals</p> |
| 2. Identify presence and use of hazardous chemicals in the workplace | <p>2.1 Apply organisational inspection techniques to identify and document hazardous chemicals in the workplace</p> <p>2.2 Participate in consultation processes with workers to identify hazardous chemicals in the workplace</p> <p>2.3 Identify tasks that may expose workers to hazardous chemicals used in the workplace</p> |
| 3. Contribute to the control of hazardous chemicals in the workplace | <p>3.1 Use WHS laws and guidance notes in relation to hazardous chemicals to identify controls to remove or reduce worker exposure</p> <p>3.2 Assess effectiveness of current control measures according to WHS laws, guidance notes, and organisational policies and procedures</p> <p>3.3 Participate in selecting additional control measures for implementation, as required</p> <p>3.4 Assist in implementing procedures for safe use, handling, processing, storage, transportation, and disposal of hazardous chemicals</p> <p>3.5 Contribute to ensuring control measures are maintained according to organisational procedures</p> |
| 4. Support worker consultation methods for hazardous chemicals | <p>4.1 Communicate information about identified hazardous chemicals, and support required personnel at risk of exposure to them</p> <p>4.2 Gather information about exposure to hazardous chemicals and possible health effects reported by workers</p> <p>4.3 Report gathered information to required parties including</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
| | duty holders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none">Locates information from WHS laws, and workplace policies, procedures and records |
| Writing | <ul style="list-style-type: none">Uses structure and language appropriate to audience and context in plans, reports, and general advice |
| Oral communication | <ul style="list-style-type: none">Presents information and assistance using appropriate levels of industry-specific vocabularyUses listening and questioning to clarify and confirm understanding |
| Navigate the world of work | <ul style="list-style-type: none">Follows legal and regulatory guidance and organisational policies and procedures in hazardous chemicalsKeeps up to date with changes to WHS laws, and organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none">Identifies what to communicate and to whom in a range of contextsCooperates with others as part of WHS activities and contributes to specific activities requiring joint responsibility and accountabilityShares information and resources, offers assistance voluntarily, and provides feedback when requestedPlays an active role in group discussions, paying attention to perspectives of others and encouraging participation |
| Get the work done | <ul style="list-style-type: none">Plans and implements tasks to achieve required outcomesUses decision-making processes, setting or clarifying goals, gathering information to identify hazardous chemicals |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS331 Participate in identifying and controlling hazardous chemicals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- participate in:
 - identifying two hazardous chemicals in the workplace
 - selecting and implementing risk control options for each of the two identified chemicals
- on at least two occasions, promote and support worker consultation and participation in hazardous chemical identification.
-

Knowledge Evidence

The candidate must demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- requirements of commonwealth and state/territory WHS laws and publications relating to identifying and controlling hazardous chemicals:
 - communication, consultation and participation
 - notification of incidents
 - recordkeeping
 - identification, risk assessment and control methods
 - basic principles of incident causation and injury processes
- organisational policies and procedures relating to identifying and controlling hazardous chemicals:
 - inspection techniques used to identify and document them
 - controls to remove or reduce worker exposure
 - assessing effectiveness of control measures
 - ensuring use and maintenance of control measures
- internal and external sources of WHS information and data:

- safety data sheets (SDSs)
- risk control options for hazardous chemicals and work situations
- WHS hazards that may be present in the workplace:
 - harm they can cause, and how this harm occurs
 - potential hazards associated with the chemicals described in the performance evidence, including environmental, fire, health and reactivity
- types of hazard and risk registers, and their key components
- requirements of workplace communication processes for sharing information about hazard identification, and risk assessment and control measures.
-

Assessment Conditions

Assessment must comply with WHS laws, and WHS legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken in the regulation, licensing and risk associated with working with hazardous chemicals, and must include access to:

- workplace equipment, technology, software and consumables required to implement and maintain internal control procedures
- corporate governance documentation required for role
- case studies and, where possible, actual workplace situations
- opportunities for interaction with others
- organisational policies and procedures required for role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS332X Apply infection prevention and control procedures to own work activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 6.1. |

Application

This unit describes the skills and knowledge required to undertake work activities in compliance with organisational procedures that prevent and control infection. It involves implementing standard and transmission-based precautions, identifying infection hazards, and assessing and responding to infection risks.

The unit applies to all workers required to undertake their activities in compliance with the infection prevention and control procedures in place in their workplace.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Unit Sector

Cross-Sector – Infection Prevention and Control

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to undertake work activities in a manner that supports infection prevention and control | 1.1 Identify job requirements 1.2 Identify organisational infection prevention and control procedures relating to identified job requirements 1.3 Identify infection hazards associated with work activities and environment and assess the risk |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>according to organisational procedures</p> <p>1.4 Identify and implement infection prevention and control measures relating to identified hazards within scope of own role and responsibilities and according to organisational procedures</p> |
| 2. Undertake work activities in a manner that supports infection prevention and control | <p>2.1 Use resources and equipment according to organisational infection prevention and control procedures and manufacturer specifications</p> <p>2.2 Clean and maintain own work area according to organisational infection prevention and control procedures</p> <p>2.3 Respond to infection prevention and control hazards and non-compliance arising in the course of activities, within scope of own role or escalate to required personnel</p> <p>2.4 Respond to exposure to infection of self or others according to organisational procedures and within required timeframes</p> |
| 3. Finalise work activities according to organisational infection prevention and control requirements | <p>3.1 Maintain and store resources and equipment used in the course of own activities according to organisational infection prevention and control procedures and manufacturer specifications</p> <p>3.2 Dispose of waste and confine contaminated resources or equipment according to organisational infection prevention and control procedures</p> <p>3.3 Complete incident reports and convey to required personnel according to organisational procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Oral communication | <ul style="list-style-type: none"> Explains an infection hazard or non-compliance to required personnel, using suitable words and terms and responding clearly to specific enquiries Listens to and interprets information relevant to own role in relation to infection prevention and control |

| Skill | Description |
|---------------------------|---|
| Reading | <ul style="list-style-type: none">Interprets information in a range of workplace procedures essential to infection prevention and control in own role |
| Writing | <ul style="list-style-type: none">Records easy-to-read information relating to workplace hazards and incidents, using words and terms appropriate to audience and purpose |
| Initiative and enterprise | <ul style="list-style-type: none">Identifies both obvious and less evident hazards to self and others |
| Problem solving | <ul style="list-style-type: none">Identifies and applies infection prevention and control measures suited to own role and work environment |

Unit Mapping Information

No equivalent unit.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS332X Apply infection prevention and control procedures to own work activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 6.1. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- apply organisational infection prevention and control procedures to own work activities on at least three different occasions
- identify at least two different infection hazards, assess the risk they pose, and respond to each within scope of own role and responsibilities and according to organisational infection prevention and control procedures.

In the course of the above, the candidate must:

- demonstrate the use of required precautions and control measures, as required for own work activities
- confine at least one resource or piece of equipment that is suspected of being contaminated, according to organisational infection prevention and control procedures
- dispose of waste according to organisational infection prevention and control procedures.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- nature and types of infection-related hazards in own work environment
- chain of infection:
 - source of infectious agent
 - mode of transmission
 - susceptible host and factors that increase susceptibility
- key modes of disease transmission – contact, airborne and droplet:
 - paths of transmission, including direct contact, aerosols and penetrating injuries

- risk of acquisition
- sources of infecting microorganisms, including persons who are carriers, in the incubation phase of the disease or those who are acutely ill
- precautions and control measures for infection hazards associated with own role and work activities, including standard and transmission-based precautions:
 - required personal health and hygiene, including:
 - checking and reporting indicators of own ill health
 - respiratory hygiene and cough etiquette
 - hand hygiene: procedures for hand washing and hand rubbing; and situations requiring the use of soap and water or alcohol-based hand rub
 - guidelines on maintaining fingernails and intact skin
 - guidelines on wearing jewellery and watches
 - social distancing measures
 - organisational procedures relating to own role and work activities, including for:
 - identifying hazards associated with own work activities and workplace environment, including infection-related hazards
 - assessing risks associated with identified hazards, including determining the likelihood and severity of harm
 - reporting hazards that put self and others at risk, including infection hazards
 - identifying, sourcing and checking the serviceability of PPE required in own role and work activities:
 - eye protection: protective glasses or goggles
 - gloves
 - masks or face shields
 - protective clothing and footwear
 - completing incident reports
- organisational infection prevention and control procedures relating to own role, work activities and physical environment, including for:
 - escalating hazard prevention and control matters outside scope of own role
 - handling, transporting, reprocessing or processing resources and equipment used in the course of own work activities in a manner that:
 - prevents skin and mucous membrane exposure, contamination and transfer of pathogens
 - limits contamination of resources and equipment
 - controls the spread of infection
 - handling and disposing of waste relating to own work activities, including contaminated waste
 - environmental cleaning of own work area, including cleaning and disinfecting surfaces: procedures and specified schedules
 - confining contaminated resources and equipment to designated areas
 - confining workplace records and materials to clean areas
 - responding to exposure to infection of self or others, including to body fluids

- infection prevention and control protocols required by own work activities:
 - placing appropriate signs when and where appropriate
 - removing spills
 - separating and maintaining clean and contaminated areas
- manufacturer specifications relating to resources and equipment used and maintained in the course of own work activities.
-

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- suitable facilities, equipment and resources, including:
 - organisational infection prevention and control procedures and guidelines
 - PPE suited to work role and job requirements
 - hygiene facilities and equipment relevant to workplace
 - waste disposal equipment suited to waste generated during work activities
 - areas for cleaning.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS411 Implement and monitor WHS policies, procedures and programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to implement and monitor an organisation's work health and safety (WHS) policies, procedures and programs in the relevant work area in order to meet legislative requirements.

The unit applies to those with supervisory responsibilities in a work area who have a broad knowledge of WHS policies and contribute well-developed skills in creating solutions to problems through analysis and evaluation of information from a variety of sources. They provide supervision and guidance to others and have limited responsibility for the output of others.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Provide information to work team about WHS policies and procedures | 1.1 Identify and communicate relevant provisions about WHS laws to work team 1.2 Provide information about organisation's WHS policies, procedures and programs, and ensure it is readily accessible to work team 1.3 Communicate information about identified hazards and outcomes of risk assessment and control to work team |
| 2. Implement and monitor work team consultative arrangements for managing WHS | 2.1 Communicate importance of consultation mechanisms in managing WHS risks to work team 2.2 Apply consultation mechanisms to facilitate work team participation in managing work area hazards, according to organisational policies and procedures 2.3 Contribute to managing issues raised through consultation mechanisms, according to organisational consultation procedures and WHS legislative requirements 2.4 Communicate outcomes of consultation about WHS issues to work team |
| 3. Implement and monitor organisational procedures for providing WHS training to work team | 3.1 Identify and document team WHS training needs according to organisational requirements and WHS laws 3.2 Make arrangements to meet WHS training needs of team members in consultation with relevant stakeholders 3.3 Provide workplace learning opportunities to facilitate team and individual achievement of identified WHS training needs |
| 4. Implement and monitor organisational procedures and legal requirements for identifying hazards, and assessing and controlling risks | 4.1 Identify and report on hazards in work area according to organisational policies and procedures, and WHS legislative requirements 4.2 Contribute to managing and implementing hazard reports according to organisational policies and procedures, and WHS legislative requirements 4.3 Implement procedures to control risks using the hierarchy of control measures according to organisational policies and procedures, and WHS legislative requirements 4.4 Identify and report inadequacies in existing risk controls according to the hierarchy of control measures, and WHS legislative requirements 4.5 Monitor outcomes of reports on inadequacies, as required, to ensure prompt organisational response |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| 5. Implement and monitor organisational procedures for maintaining WHS records | <p>5.1 Complete and maintain WHS incident records of occupational injury and disease in work area according to organisational policies and procedures, and WHS legislative requirements</p> <p>5.2 Use aggregate information and data from work area records to meet organisational recordkeeping requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and analyses WHS laws and organisational texts |
| Writing | <ul style="list-style-type: none"> Documents organisational WHS policies, procedures and programs according to WHS laws, using structure, layout and language suitable for audience Records WHS issues and actions taken according to reporting requirements Prepares and maintains required records using appropriate structure and vocabulary |
| Oral communication | <ul style="list-style-type: none"> Provides WHS organisational information and advice using structure and language suitable for audience Uses questioning and active listening to clarify understanding |
| Navigate the world of work | <ul style="list-style-type: none"> Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to own WHS role and responsibilities Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols to facilitate consultation and provide feedback Initiates and contributes to facilitating consultative role: responding, explaining, clarifying and expanding on ideas and information as required Collaborates with others to achieve individual team member and team outcomes |
| Get the work done | <ul style="list-style-type: none"> Uses combination of logical planning and intuitive understanding of context to identify relevant information and risks, and to identify and evaluate alternative strategies Uses decision-making processes: sets and clarifies goals, gathers |

| Skill | Description |
|-------|---|
| | <p>information, and identifies and evaluates choices against a set of criteria</p> <ul style="list-style-type: none">• Takes responsibility for reporting WHS risk control inadequacies• Uses processes to monitor implementation of WHS organisational procedures |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS411 Implement and monitor WHS policies, procedures and programs

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- implement and monitor the work health and safety (WHS) policies, procedures and programs for one work area in an organisation.

During the above, the candidate must:

- explain relevant WHS information clearly and accurately to work team
- provide work team with access to WHS policies, procedures and programs in appropriate structure and language
- implement and monitor procedures, according to WHS legislative and organisational requirements, for:
 - consultation on and communication about WHS hazards and risks
 - WHS training needs and learning opportunities
 - WHS records
 - using WHS aggregate data relating to hazards and risk control.

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- key provisions of commonwealth and state/territory WHS laws that apply to the business, and procedures for their application in the work area
- organisational policies and procedures for:
 - consulting during WHS issue management
 - identifying hazards and managing risks, including using aggregate information and work area data
 - incident response, investigation and reporting

- legal responsibilities and duties of managers, supervisors, persons conducting a business or undertaking (PCBUs) and workers in relation to WHS risk management in the workplace
- procedures for assessing implications of near misses in relation to incidents, injuries and illnesses in the work area
- effective consultation mechanisms in managing health and safety risks in the workplace
- features of effective workplace learning opportunities, including coaching and mentoring assistance that facilitates team and individual achievement of WHS training needs
- key principles and components of the hierarchy of control measures
- procedures for applying the hierarchy of control measures in own work area.

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- actual workplace or simulated environment
- workplace equipment and resources
- examples of documents about workplace safety, hazard identification and risk assessment
- WHS laws and organisational documentation required to demonstrate the performance evidence
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS412 Assist with workplace compliance with WHS laws

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to assist with establishing and maintaining workplace compliance with work health and safety (WHS) laws. It includes identifying applicable WHS laws, duties, rights and obligations, and the necessary actions to ensure WHS compliance in the workplace.

It also includes assisting with providing advice about the legislative duties, rights and obligations of individuals and parties prescribed in WHS laws and those of WHS regulators.

The unit applies to those working in a broad range of WHS roles across all industries.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assist with identifying the legal framework for WHS in the workplace | 1.1 Access current WHS laws and related documentation relevant to organisation's operations 1.2 Assist with analysing accessed information to determine legal requirements in the workplace 1.3 Assist with identifying and confirming duties, rights and obligations of individuals and/or parties as specified in WHS laws 1.4 Assist with seeking advice from legal advisers as required |
| 2. Assist with providing advice about WHS compliance | 2.1 Assist individuals and/or parties to locate information about their WHS duties, rights and obligations 2.2 Assist with providing advice to individuals and/or parties about their WHS duties, rights and obligations, within scope of own role 2.3 Assist with providing advice to individuals and/or parties about the functions and powers of the WHS regulator and workplace regulatory compliance matters |
| 3. Assist with establishing WHS legislative compliance | 3.1 Assist with assessing workplace compliance with relevant WHS laws 3.2 Assist with reporting on outcomes of compliance assessment 3.3 Assist with determining and documenting recommendations that address identified non-compliance 3.4 Assist with determining related WHS training needs of work team, and with providing the WHS training to meet legislative and organisational requirements |
| 4. Assist with maintaining WHS legislative compliance | 4.1 Assist with developing or modifying workplace policies, procedures, processes and systems that support compliance according to organisational policies and procedures, and WHS legislative requirements 4.2 Assist with communicating developed or modified workplace policies, procedures, processes and systems 4.3 Assist with monitoring implementation of developed or modified workplace policies, procedures, processes and systems to ensure legislative compliance |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Reviews and interprets at times complex WHS legislative and organisational texts |
| Writing | <ul style="list-style-type: none"> Documents WHS advice using structure, layout and language suitable for audience Drafts, documents, and updates policies, procedures and processes according to requirements and using appropriate vocabulary and register |
| Oral communication | <ul style="list-style-type: none"> Uses structure and language suitable for audience to provide, seek and discuss WHS legislative information Uses questioning and active listening to clarify understanding |
| Navigate the world of work | <ul style="list-style-type: none"> Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to own WHS role and responsibilities Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Cooperates with others as part of WHS compliance activities, and contributes to specific activities requiring joint responsibility and accountability Collaborates with others to achieve individual and team outcomes |
| Get the work done | <ul style="list-style-type: none"> Uses combination of logical planning and intuitive understanding of context to identify relevant information and hazards, and to evaluate alternative strategies in relation to WHS compliance Uses decision-making processes in relation to WHS compliance: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS402 Assist with compliance with WHS laws.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS412 Assist with workplace compliance with WHS laws

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- assist with establishing workplace compliance with work health and safety (WHS) laws in relation to at least two different compliance matters and within scope of own role.

During the above, the candidate must assist with:

- identifying current WHS legal requirements for the workplace
- providing advice about current WHS legal requirements for the workplace
- assessing and maintaining workplace compliance with WHS legislative requirements
- making recommendations for implementing workplace changes in order to achieve WHS legal compliance
- monitoring compliance with WHS laws according to organisational policies and procedures.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of WHS information, and procedures for accessing them
- duties, rights and obligations of work team as specified in WHS laws, and location of relevant information about WHS laws
- functions and powers of relevant WHS regulator and how they are exercised
- regulatory compliance matters, including objectives and principles underpinning WHS laws
- methods used for:
 - assessing and maintaining WHS compliance
 - determining training needs in relation to WHS compliance

- implementing changes to policies, procedures, processes and systems to achieve WHS compliance
- organisational policies and procedures for:
 - documenting compliance requirements
 - assessing WHS compliance obligations and processes to address non-compliance
 - recording and documenting compliance assessment.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws and organisational documentation required to demonstrate the performance evidence
- reports from individuals and parties consulted about WHS compliance
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS413 Contribute to implementation and maintenance of WHS consultation and participation processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to implementing and maintaining work health and safety (WHS) consultation and participation as prescribed in legislation.

It also covers contributing to communicating relevant information, identifying feedback opportunities, and improving consultation and participation.

The unit applies to those working in a broad range of WHS roles across all industries.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify individuals and parties, and their roles and responsibilities for WHS consultation and participation | <p>1.1 Apply knowledge of relevant parts of WHS laws, policies and procedures as they apply to WHS consultation and participation</p> <p>1.2 Identify individuals with roles, duties, rights and responsibilities regarding WHS consultation and participation according to organisational policies and procedures</p> <p>1.3 Identify own role, duties, rights and responsibilities regarding WHS consultation and participation as appropriate to work area</p> <p>1.4 Communicate roles, duties, rights and responsibilities to individuals and/or parties according to organisational policies and procedures</p> |
| 2. Contribute to implementing WHS consultation and participation processes | <p>2.1 Identify established organisational WHS consultation and participation processes</p> <p>2.2 Identify required personnel to participate in WHS consultation</p> <p>2.3 Contribute to setting up and implementing WHS consultation processes as appropriate to own role and work area</p> <p>2.4 Create opportunities for participating individuals and/or parties to provide feedback on WHS consultation processes</p> <p>2.5 Document consultation opportunities according to organisational policies and procedures</p> <p>2.6 Promote and support participation of individuals and/or parties in WHS consultation processes as appropriate to own role and work area</p> |
| 3. Contribute to processes for communicating and sharing WHS information and data | <p>3.1 Identify consultation and participation processes for communicating and sharing WHS information and data</p> <p>3.2 Identify training requirements for individuals and/or parties necessary for effective WHS consultation and participation</p> <p>3.3 Contribute to and participate in sharing WHS information and data as appropriate to own role and</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| | <p>work area</p> <p>3.4 Create methods to ensure WHS information and data is accessible to required personnel in work area</p> <p>3.5 Record and store WHS information and data according to organisational policies and procedures</p> |
| 4. Contribute to assessment of WHS consultation and participation feedback processes | <p>4.1 Identify consultation and participation methods for gathering and documenting feedback on processes from individuals and/or parties</p> <p>4.2 Contribute to assessing opportunities for individuals and/or parties to express their views during consultation and participation</p> <p>4.3 Document outcomes from assessment of feedback processes and communicate outcomes to relevant stakeholders according to organisational policies and procedures</p> |
| 5. Contribute to improving WHS consultation and participation processes | <p>5.1 Contribute to identifying and assessing barriers to, and opportunities for improving, implementation and effectiveness of WHS consultation and participation processes</p> <p>5.2 Contribute to developing, implementing and evaluating measures to remove barriers and improve processes</p> <p>5.3 Communicate improvements to required personnel according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|---|
| Reading | <ul style="list-style-type: none"> Reviews and interprets WHS legislative and organisational texts |
| Writing | <ul style="list-style-type: none"> Uses structure, layout and language suitable for audience to draft and document consultation and participation processes Records required WHS information using appropriate organisational formats |
| Oral | <ul style="list-style-type: none"> Uses structure and language suitable for audience to provide relevant |

| Skill | Description |
|----------------------------|--|
| communication | <p>WHS organisational information</p> <ul style="list-style-type: none"> • Uses questioning and active listening to identify and discuss feedback requirements, and barriers to and opportunities for improving WHS consultation processes |
| Navigate the world of work | <ul style="list-style-type: none"> • Adheres to legal and regulatory responsibilities in relation to own WHS role and responsibilities • Keeps up to date on changes to WHS laws and regulations relevant to own role |
| Interact with others | <ul style="list-style-type: none"> • Identifies what, with whom and how to communicate in the context of consultation and participation processes • Uses a range of strategies to establish a sense of connection with others • Cooperates with others as part of WHS consultation and participation processes, and contributes to specific activities requiring joint responsibility and accountability • Initiates and contributes to facilitating consultative process, responding, explaining, clarifying and expanding on ideas and information as required |
| Get the work done | <ul style="list-style-type: none"> • Applies processes when organising consultation processes, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints and the needs of others • Contributes to implementing actions according to plans, making slight adjustments as necessary and addressing unexpected issues • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria • Uses familiar digital systems and tools to access, organise, analyse and present information |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS403 Contribute to implementing and maintaining WHS consultation and participation processes.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS413 Contribute to implementation and maintenance of WHS consultation and participation processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- on at least two occasions contribute to each of the following, as applicable to own role and work area:
 - implementing and maintaining work health and safety (WHS) consultation and participation to ensure that required personnel are encouraged to participate
 - communicating information and data about WHS consultation and participation processes
 - explaining to individuals and parties the legal roles, duties, rights and responsibilities of self and others regarding WHS consultation and participation processes
 - creating opportunities for feedback on consultation and participation processes
 - identifying barriers to, and opportunities for improving, effectiveness of WHS consultation and participation processes, and to implement and maintain improvement measures.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- requirements under WHS laws for consultation and participation processes, training requirements, and the roles and responsibilities of individuals and parties required to participate
- essential components of WHS consultation processes
- organisational policies and procedures for:
 - identifying and communicating WHS consultation and participation information
 - documenting consultation barriers, opportunities and feedback

- storing WHS information and data
- internal and external sources of WHS information and data, and procedures for accessing them
- key principles, uses and components of the hierarchy of control measures that assist with implementing and maintaining WHS consultation and participation processes
- methods for obtaining feedback from individuals and/or parties on consultation and participation processes.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment, technology, software and consumables required to access information about WHS laws
- WHS laws, organisational documentation, and personnel required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS414 Contribute to WHS risk management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to WHS risk management, which includes the processes for identifying work health and safety (WHS) hazards and assessing and controlling the risk relating to those identified hazards.

It involves contributing to the development, implementation and evaluation of risk controls according to legislative and organisational requirements.

The unit applies to those working in a broad range of roles across all industries. WHS hazard identification and risk control processes are those defined in written workplace procedures.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Access information and data used to identify hazards, and to assess and control risks | <p>1.1 Access and review current WHS laws relevant to organisation's hazard identification and risk control processes</p> <p>1.2 Access workplace sources of information and data to inform hazard identification, risk assessment and risk controls</p> <p>1.3 Access external sources of information and data to inform hazard identification, risk assessment and risk controls</p> <p>1.4 Analyse information and data and determine nature and scope of workplace hazards, risk assessment and risk controls</p> <p>1.5 Confirm information and data with required stakeholders, seeking input from technical and other advisors as required</p> |
| 2. Contribute to identifying risk management requirements and compliance | <p>2.1 Contribute to identifying and complying with requirements of organisational policies, procedures, processes and systems for hazard identification, risk assessment and risk controls</p> <p>2.2 Contribute to identifying and complying with requirements of WHS laws and guidelines for hazard identification, risk assessment and risk controls</p> <p>2.3 Identify duty holders, and their roles and responsibilities according to risk management requirements</p> <p>2.4 Identify tools used by organisational in current hazard identification and risk control processes</p> |
| 3. Contribute to workplace hazard identification | <p>3.1 Contribute to selecting hazard identification tools and techniques according to WHS laws, and risk management requirements</p> <p>3.2 Use hazard identification tools and techniques to assist with identifying hazards according to risk management requirements</p> <p>3.3 Contribute to documenting hazard identification processes and results according to risk management requirements</p> <p>3.4 Apply knowledge of hazards to advise individuals and/or parties about workplace hazards and the harms they may</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| | cause |
| 4. Contribute to WHS risk assessment | <p>4.1 Identify individuals and/or parties at risk of exposure to hazards and determine the nature, severity and likelihood of potential harm</p> <p>4.2 Contribute to applying tools, techniques and processes to identified hazards to assess risk, according to risk management requirements</p> <p>4.3 Contribute to documenting risk assessment results according to risk management requirements</p> <p>4.4 Contribute to communicating risk assessment outcomes with workers, contract workers, managers and technical specialists according to risk management requirements</p> |
| 5. Contribute to developing and implementing risk controls | <p>5.1 Contribute to selecting risk controls for identified hazards based on the risk assessment</p> <p>5.2 Document agreed risk controls according to risk management requirements</p> <p>5.3 Contribute to developing risk controls according to the hierarchy of control measures and WHS laws</p> <p>5.4 Contribute to implementing risk controls and seek supervisory advice as required by the circumstances</p> <p>5.5 Support communication of information on risk controls and actions to required individuals and/or parties</p> |
| 6. Contribute to evaluating effectiveness of risk controls | <p>6.1 Identify requirements for ensuring ongoing effectiveness of risk controls</p> <p>6.2 Contribute to identifying measures that enable evaluation of effectiveness of risk controls</p> <p>6.3 Document plan for monitoring effectiveness of risk controls according to organisational policies and procedures</p> <p>6.4 Present and effectively communicate plan to required stakeholders according to risk management requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none">Locates, reviews and interprets WHS legislative and organisational texts and other external information and data |
| Writing | <ul style="list-style-type: none">Uses structure, layout and language suitable for audience to document WHS hazard identification and risk control processesUses appropriate organisational formats and industry-specific vocabulary to document hazards, risks, and risk controls |
| Oral communication | <ul style="list-style-type: none">Uses structure and language suitable for audience to communicate information and contribute ideas about WHS hazard identification and risk control processes |
| Navigate the world of work | <ul style="list-style-type: none">Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to WHS hazard identification and risk control processesKeeps up to date with WHS laws, and related organisational policies and procedures relevant to own roleUses appropriate technology in accessing, communicating, and recording information |
| Interact with others | <ul style="list-style-type: none">Identifies what, with whom and how to communicate in the context of advising about hazards, risks and risk controlsCooperates with others as part of WHS hazard identification and risk control processes, and contributes to specific activities requiring joint responsibility and accountabilityCollaborates with others to achieve individual and team outcomesInteracts to develop relationships with operational personnel and consultative groups |

| Skill | Description |
|-------------------|---|
| | <ul style="list-style-type: none">Seeks information from others to understand work and work relationships as they relate to hazard management |
| Get the work done | <ul style="list-style-type: none">Applies processes to plan, sequence and prioritise tasks, showing awareness of time and resource constraints and the needs of othersUses decision-making processes in hazard identification and risk control processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteriaApplies problem-solving processes, identifying and evaluating several options for action |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS404 Contribute to WHS hazard identification, risk assessment and risk control.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS414 Contribute to WHS risk management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to contribute to:

- identifying at least two different (WHS) hazards and controlling the risks associated with those hazards
- evaluating the effectiveness of the above risk controls.

During each of the above occasions, the candidate must:

- identify and interpret information and data about WHS requirements and apply them to the selection and application of techniques, tools and processes for hazard identification, risk assessment and risk control
- contribute to documenting processes
- communicate with required people about WHS requirements and compliance
- comply with WHS requirements for hazard identification, risk assessment, and risk control activities
- identify WHS duty holders and their duties.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of WHS information and data relating to the performance evidence, and procedures for accessing them
- WHS hazard identification, risk assessment and risk control processes specified in:
 - required WHS laws
 - organisational WHS policies, procedures, processes, and systems
- risk management requirements, including:
 - identifying duty holders and their roles and responsibilities

- selecting and using hazard identification tools and techniques
- undertaking, documenting and communicating risk assessments
- evaluating risk controls
- documenting and communicating risk control plan
- differences between hazards and risks in the workplace
- range of common workplace hazards, and the nature, severity and likelihood of those hazards
- risk assessment and controls that can eliminate or minimise risks.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment, technology, software and consumables required to access information on WHS laws
- WHS laws, and organisational policies, procedures, processes and systems required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS415 Contribute to implementing WHS management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to implementing a plan for a work health and safety management system (WHSMS) that applies to own role.

The unit applies to individuals with responsibilities for contributing to the implementation of an organisation's WHSMS as part of their work health and safety (WHS) responsibilities in a range of industry and workplace contexts.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.
3. For the purposes of this unit of competency 'safe systems of work' refers to a formal procedure that results from systematic examination of a task in order to identify all the hazards. It defines safe methods to ensure that hazards are eliminated or, where this is not possible, risks are minimised.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Contribute to developing WHSMS implementation plan | 1.1 Apply knowledge of WHS laws and organisational policies and procedures to identify duty holders relevant to own role 1.2 Contribute to identifying elements of WHSMS plan to be implemented relevant to own role 1.3 Record plan according to organisational policies and procedures 1.4 Communicate plan to others, and integrate their feedback as required |
| 2 Contribute to implementing developed plan | 2.1 Implement plan for WHSMS within scope of own role 2.2 Communicate plan to others in relation to their roles and responsibilities as specified in plan, and clarify as required 2.3 Facilitate contribution of others to implement plan |
| 3 Contribute to reviewing WHSMS implementation plan | 3.1 Contribute to monitoring safe systems of work according to organisational policies and procedures and within scope of own role 3.2 Contribute to evaluating effectiveness of implemented elements of WHSMS plan and implementation process 3.3 Contribute to adjusting implementation plan as required according to organisational policies and procedures 3.4 Document and distribute adjusted plan to required personnel according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|---|
| Reading | <ul style="list-style-type: none">Locates, reviews and interprets WHS laws and organisational texts |

| Skill | Description |
|----------------------------|---|
| Writing | <ul style="list-style-type: none"> • Uses structure, layout and language suitable for audience to document WHSMS implementation plan • Develops required documentation using appropriate organisational formats and industry-specific vocabulary |
| Numeracy | <ul style="list-style-type: none"> • Collects, organises and analyses information about systems of work and draws conclusions in relation to effectiveness of WHSMS plan |
| Oral communication | <ul style="list-style-type: none"> • Presents information and advice about WHSMS using language, structure and register appropriate to audience • Asks questions and listens closely to gather required information |
| Navigate the world of work | <ul style="list-style-type: none"> • Takes responsibility for own adherence to legal and regulatory responsibilities, and organisational policies and procedures in relation to WHS and WHSMS • Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> • Identifies what, with whom and how to communicate in the context of WHS policy and performance, and WHSMS processes • Cooperates with others as part of WHS and WHSMS processes, and contributes to specific activities requiring joint responsibility and accountability • Collaborates with others to achieve individual and team outcomes |
| Get the work done | <ul style="list-style-type: none"> • Applies formal processes to plan, sequence and prioritise tasks and workload, showing awareness of time, resource constraints and needs of others • Uses digital systems and programs to assist with planning, implementing and tracking progress, and communicating • Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria • Applies formal problem-solving processes, identifying and evaluating several options for action |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS405 Contribute to implementing and maintaining WHS management systems.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS415 Contribute to implementing WHS management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to contribute to:

- planning the implementation of a work health and safety management system (WHSMS) that incorporates return-to-work and injury management procedures, and other key relevant WHSMS elements
- implementing the WHSMS plan and reviewing its effectiveness.

During the above, the candidate must:

- communicate and explain the WHSMS plan and associated WHS policy to others to facilitate their contribution to implementing the system.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- elements of organisation's WHSMS and associated plan with reference to required commonwealth and state/territory WHS laws and standards, including:
 - required policies and procedures, including those concerning return-to-work and injury management
 - duty holders and their responsibility
 - safe systems of work
 - consultation and communication arrangements
 - required training and induction
 - WHS risk assessment
- organisational WHS policies, procedures, processes and systems relevant to implementing WHSMS in own work role

- tools, methods and processes for implementing and reviewing WHSMS plan, including consultation with required personnel
- regulatory authority WHSMS tools, standards, guidance material and procedures required to contribute to implementing WHS management systems.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws and organisational WHS policies and procedures required to demonstrate the performance evidence
- workplace equipment, technology, software and consumables required to access information about WHS laws
- WHS laws, and organisational policies, procedures, processes and systems required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS416 Contribute to workplace incident response

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to assist with actions and activities performed in response to workplace incidents according to work health and safety (WHS) legislative and organisational requirements.

The unit applies to those who contribute to workplace incident responses by undertaking a varied range of activities in a structured and familiar work environment as defined in written procedures. It applies to people who work in a broad range of WHS roles across all industries.

NOTES

1. The terms 'incident' and 'accident' are equivalent. Specific state/territory legislation may use one or the other. In jurisdictions where *model WHS laws* have not been implemented, RTOs are advised to contextualise this unit of competency by referring to the existing state/territory OHS legislative requirements and industry-specific legislative variances.
2. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
3. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to assist with actions and activities associated with incident response | <p>1.1 Identify duty holders and WHS legislative requirements for incident response</p> <p>1.2 Identify workplace policies, procedures and processes concerning incident response planning and reporting</p> <p>1.3 Communicate requirements for responding to incident to required personnel within scope of own role and work area</p> <p>1.4 Contribute to developing communication mechanisms to notify manager of incident</p> |
| 2. Assist with implementing response procedures during incident | <p>2.1 Provide initial assistance to those involved in incident within scope of own role and expertise and according to organisational incident response policies and procedures</p> <p>2.2 Assist with documenting incident according to workplace procedures and processes</p> <p>2.3 Assist with meeting legislative requirements regarding incident, within scope of own role and expertise</p> <p>2.4 Assist with reporting incident to external authorities, according to legislative requirements and workplace procedures and processes</p> |
| 3. Contribute to collecting WHS information about incident | <p>3.1 Assist with obtaining information and data from those involved about actions and events leading up to, during and after an incident, using appropriate data collection techniques</p> <p>3.2 Assist with identifying and accessing sources of additional information and data related to incident</p> <p>3.3 Compile and enter information according to record-keeping requirements</p> |
| 4. Assist with incident investigation | <p>4.1 Assist with applying required incident investigation processes</p> <p>4.2 Use appropriate analysis techniques to interpret causes of incident and communicate with advisors</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| | <p>when participating in workplace investigations</p> <p>4.3 Review incident reports according to organisational policies and procedures</p> <p>4.4 Contact responsible persons and relevant authorities as outlined in WHS laws, and organisational policies and procedures</p> <p>4.5 Contribute to communicating investigation outcomes to relevant stakeholders according to organisational policies and procedures</p> |
| 5. Contribute to developing and implementing recommended measures and actions arising from incident investigation | <p>5.1 Contribute to developing incident investigation recommendations</p> <p>5.2 Assist with obtaining approval of developed recommendations from required stakeholders according to organisational policies and procedures</p> <p>5.3 Assist with communicating approved recommendations to required stakeholders according to organisational policies and procedures</p> <p>5.4 Contribute to implementing recommended measures and actions arising from incident investigation within scope of own role and according to WHS legislative requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Locates, reviews and interprets WHS legislative texts Analyses reports and other material about incidents to determine required course of action |
| Writing | <ul style="list-style-type: none"> Completes workplace records, forms and documentation using correct format, spelling and grammar, and industry-specific terminology Records information for reference using language appropriate to audience |
| Oral Communication | <ul style="list-style-type: none"> Presents information and advice using structure and language suitable for audience Uses questioning and listening techniques to obtain feedback from |

| Skill | Description |
|----------------------------|---|
| | others and confirm understanding |
| Navigate the world of work | <ul style="list-style-type: none"> Adheres to legal and regulatory responsibilities, and organisational policies and procedures Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Identifies what, with whom and how to communicate in the context of incident responses and investigations Collaborates with others to achieve individual and team outcomes Cooperates with others as part of incident investigations and contributes to specific activities requiring joint responsibility and accountability |
| Get the work done | <ul style="list-style-type: none"> Applies processes to plan, sequence and prioritise tasks required for incident responses and investigations, showing awareness of time, resource constraints and needs of others Uses features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS406 Assist with responding to incidents.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS416 Contribute to workplace incident response

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to responding to at least two different workplace incidents according to work health and safety (WHS) legislative and organisational requirements.

During the above, the candidate must:

- identify duty holders relevant to incident response
- contribute to:
 - communicating WHS requirements clearly and accurately to individuals and/or parties involved
 - reporting each incident according to WHS legislative and organisational requirements
 - obtaining information about each incident using appropriate data-collection techniques
 - developing and contributing to implementing required actions in response to each incident
 - investigating incident
 - communicating and implementing recommendations from investigation.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws about investigating and reporting workplace incidents
- sources of internal and external WHS information and data relating to incidents, and procedures for accessing them
- organisational policies, procedures, processes and systems relevant to own role or work area that relate to incident response and investigation, including those for:

- recording information relating to workplace incident responses
- reporting information to external authorities
- implementing improvements to policies, procedures, processes and systems as a result of an incident
- communication strategies to facilitate engagement of individuals and/or parties in incident response
- roles and responsibilities of self and duty holders in responding to workplace incidents.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational policies, standard operating procedures, procedures and plans required to demonstrate the performance evidence
- WHS legislation, licensing requirements and standards required to demonstrate the performance evidence
- WHS data required to contribute to incident response
- case studies and, where possible, real situations
- workplace equipment and resources
- opportunities for interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS417 Assist with managing WHS implications of return to work

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to assist with managing the WHS implications of activities that facilitate an injured worker's return to work. It involves identifying those with roles, duties, rights and responsibilities for return to-work, as well as assisting in preparing, implementing and evaluating the return to work.

The unit applies to those in an organisation who assist with the WHS implications of return-to-work activities. In many organisations, this role will be performed alongside others from within the organisation or external parties, including those working in human resources, workers' compensation, workplace rehabilitation, other professional and administrative capacities, and other roles relating to return to work.

NOTES

1. The unit does not in any way address the process of treating workers for their injury or illness, which is the task of health and medical professionals.
2. Workers' compensation legislation and associated duties will differ between jurisdictions. RTOs are advised to contextualise this unit of competency by referring to the requirements of existing state/territory workers' compensation legislation.
3. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
4. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify return-to-work requirements | 1.1 Identify legislative requirements for facilitating injured worker's return to work 1.2 Identify individuals and parties with roles, duties, rights and responsibilities regarding injured worker's return to work 1.3 Identify relevant organisational policies and requirements for injured worker's return to work |
| 2. Assist with preparing return to work for injured worker | 2.1 Assist with identifying suitable return-to-work duties for injured worker in consultation with required internal and external stakeholders 2.2 Identify potential barriers for worker returning to work, in consultation with relevant parties 2.3 Assist with design of return-to-work program for injured worker based on advice from medical professionals and consultation with required parties, and within scope of own role 2.4 Assist with identifying potential WHS-related risks to other team members arising from injured worker's reduced capacity and absence, and how to manage these potential risks 2.5 Assist with establishing agreement between required parties on injured worker's return to work |
| 3. Assist with implementing return to work | 3.1 Assist with assessing intended work environment for injured worker for potential WHS-related risk 3.2 Consult with required stakeholders about WHS implications of return to work, and assist with incorporating feedback 3.3 Assist with providing guidance to required personnel about WHS implications of return-to-work process and support for necessary adjustments |
| 4. Assist with monitoring and evaluating return to work | 4.1 Facilitate regular feedback and communication between relevant parties 4.2 Assist with monitoring return to work and identifying hazards and areas of non-compliance according to organisational policies |

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|---|
| | <p>and procedures</p> <p>4.3 Assist with taking action to address WHS hazards and areas of non-compliance, and modifying return to work as required according to WHS laws, and organisational WHS policies and procedures</p> <p>4.4 Assist with evaluating return to work and implementing WHS-related recommendations for required improvements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Reviews and analyses WHS legislative requirements and organisational texts about return to work |
| Writing | <ul style="list-style-type: none"> Produces information, reports and records using structure, language and layout appropriate to audience and organisational requirements |
| Oral communication | <ul style="list-style-type: none"> Seeks and provides information about injured worker and return to work using language and features suitable for audience and context |
| Numeracy | <ul style="list-style-type: none"> Performs calculations necessary to provide estimates related to timeframes |
| Navigate the world of work | <ul style="list-style-type: none"> Adheres to WHS legal and regulatory responsibilities, and organisational policies and procedures in relation to own role and responsibilities Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Identifies what, with whom and how to communicate in the context of own role and responsibilities Cooperates with others as part of processes, and contributes to specific activities requiring joint responsibility and accountability Collaborates and negotiates with others to achieve joint/agreeable outcomes in sensitive situations Communicates effectively with a range of medical and other professionals in relation to role and responsibilities |
| Get the work done | <ul style="list-style-type: none"> Plans tasks with logically sequenced steps, reflecting awareness of time and resource constraints and needs of others Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of |

| Skill | Description |
|-------|--|
| | <p>criteria</p> <ul style="list-style-type: none">• Monitors progress of tasks in order to provide timely information to workers and modify plans as necessary |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS407 Assist with claims management, rehabilitation and return-to-work programs.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS417 Assist with managing WHS implications of return to work

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to assist with:

- managing WHS implications of planning and implementing return to work for one injured worker, and within scope of own role:
 - develop return-to-work objectives for worker, in consultation with treating doctor and other medical professionals where required
 - identify any required job redesign and alternative duties
 - assess work environment for injured worker for potential hazards and associated risks
- monitoring and evaluating above return to work, including:
 - identifying and taking action to address WHS hazards and areas of non-compliance
 - identifying areas for improvement and making recommendations for system improvement as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- legislative requirements relating to primary duties and risk management associated with the performance evidence, including:
 - WHS laws
 - laws relating to workers' compensation and claims management
- organisational policies and procedures for:
 - obtaining and verifying information from injured workers
 - facilitating injured workers' return to work
 - liaising with medical professionals involved in injured workers' return to work
 - assisting with designing return-to-work programs for injured workers
 - risk assessments of work environments

- monitoring return to work and responding to hazards and areas of non-compliance
- key features and components of organisation's return to work of injured workers, including:
 - roles and responsibilities of all parties involved in developing, implementing and monitoring return to work
 - typical content of return-to-work activities
 - approach to hazard identification and risk assessment regarding specific features of return to work
- potential WHS-related risks to team members arising from reduced capacity and absence of returning worker in relation to:
 - impact on workloads
 - required resources and adjustments to workspaces
 - new hazards, or potential harm from existing hazards
- roles and responsibilities of medical professionals in relation to return to work management
- methods, techniques and tools to support workers involved in return to work:
 - WHS implications of alternative duties
 - preparing a workplace for an injured worker's return to work.
-

Assessment Conditions

Assessment must comply with WHS and workers' compensation laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace documentation and WHS data required to demonstrate the performance evidence
- legislation required to assist with managing WHS implications of return to work
- organisational policies and procedures required to demonstrate the performance evidence
- workplace equipment and resources
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS418 Assist with managing WHS compliance of contractors

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to assist with managing the work health and safety (WHS) implications of using contractors. It involves identifying contractor duties, establishing organisational WHS compliance requirements associated with those duties, establishing and communicating the requirements expected of contractors, monitoring contractor compliance with WHS requirements, and implementing required responses to identified non-compliance.

The unit applies to those who work in a broad range of WHS roles across all industries in organisations that use contractors to supply services, including labour hire and temporary workers, cleaning, catering, security, maintenance, repairs, installations and alterations, and major contracts and projects, as relevant to the organisation. This includes casual and volunteer workers. It does not cover visitors, or outworkers or suppliers of goods, materials or products to workplaces.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for contractor WHS induction | <p>1.1 Identify services to be supplied by contractor, their proposed work arrangements and places of work</p> <p>1.2 Identify and review organisational documentation and WHS legislative requirements applicable to contractor</p> <p>1.3 Identify and review, within scope of own role, contractor-specific WHS compliance requirements</p> |
| 2. Assist with contractor WHS induction process | <p>2.1 Provide contractor with access to relevant WHS documentation</p> <p>2.2 Assist with WHS induction briefing specific to contractor according to organisational WHS policies and procedures</p> <p>2.3 Document completed contractor WHS induction process</p> |
| 3. Assist with monitoring contractor WHS compliance requirements | <p>3.1 Review required documentation as it applies to assessing contractor WHS compliance against agreed key performance indicators</p> <p>3.2 Participate in workplace inspections to assess contractor compliance with WHS requirements</p> <p>3.3 Document contractor non-compliance relating to WHS practices, policies and procedures</p> <p>3.4 Assist with investigating contractor non-compliance, and in making necessary adjustments to WHS contractor compliance requirements</p> |
| 4. Assist with addressing contractor WHS non-compliance | <p>4.1 Assist with reporting identified contractor WHS non-compliance according to organisational policies and procedures</p> <p>4.2 Consult with contractor and required personnel to assist with addressing areas of contractor WHS non-compliance</p> <p>4.3 Escalate contractor WHS non-compliance that is outside own role according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none">Interprets and analyses legal and organisational texts relevant to contractor WHS requirements |
| Writing | <ul style="list-style-type: none">Uses structure, layout and language suitable for audience when preparing documentation and other communications |
| Oral communication | <ul style="list-style-type: none">Uses suitable language when presenting information, offering opinions and providing advice about WHS contractor arrangements |
| Navigate the world of work | <ul style="list-style-type: none">Adheres to WHS legal and regulatory responsibilities, and organisational policies and proceduresKeeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none">Cooperates with others as part of contractor WHS arrangement processes, and contributes to specific activities requiring joint responsibility and accountabilityIdentifies what, with whom and how to communicate in the context of assisting with managing contractor WHS compliance |
| Get the work done | <ul style="list-style-type: none">Determines priorities and sequences the steps for clearly defined tasks, and identifies and assembles the resources required within scope of own roleUses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria |

Unit Mapping Information

Supersedes but is not equivalent to BSBWHS408 Assist with the management of WHS contractors.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS418 Assist with managing WHS compliance of contractors

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- assist with managing the work health and safety (WHS) compliance of two contractors, each providing different services.

During the above, the candidate must assist with:

- identifying contractor WHS arrangements, including required:
 - organisational WHS policies, procedures and systems
 - WHS induction and guidance information
- reviewing contractor work processes, procedures and activities
- addressing within scope of own role and reporting contractor non-compliance with WHS requirements.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of information and data relevant to contractor WHS arrangements, and procedures for accessing them
- organisational WHS policies, procedures, processes and systems relevant to contractors
- contexts, situations and arrangements where contractor services are supplied to the organisation
- contractor WHS arrangements with reference to relevant commonwealth and state/territory WHS laws
- key WHS requirements about workplace, contracted work, and organisational policies and procedures to be covered in contractor induction

- workplace documentation required for managing contractor WHS compliance with services involved in the performance evidence, including:
 - formal contracts and agreements to supply services or relevant parts thereof
 - supporting documents about contracts and agreements
 - organisational WHS policies and procedures
 - WHS laws
- duties, rights and obligations of individuals and parties as specified in relevant WHS laws with regard to supply of services by contractors.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws, licensing requirements and standards required to demonstrate the performance evidence
- WHS information required to demonstrate the performance evidence
- WHS requirements and related information for identified contractor services, including:
 - formal contracts and agreements to supply services
 - supporting documents about contracts and agreements
 - information about any undocumented understandings and/or agreements
- workplace equipment and resources
- case studies or, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS419 Contribute to implementing WHS monitoring processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to monitoring a range of physical agents and conditions relating to work health and safety (WHS) in the workplace. It involves the use of a range of measuring devices to collect, interpret and report on workplace information and data in relation to those physical agents and conditions.

The unit applies to those working in a broad range of WHS roles across all industries.

The unit does not extend to hazard identification, risk assessment or developing risk controls based on the outcomes of monitoring, which are covered in BSBWHS414 *Contribute to WHS risk management*.

This unit does not qualify individuals to perform duties as a registered officer under any legislation.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

Licensing, legislative and certification requirements may apply to this unit in some jurisdictions. Users are advised to check with the relevant regulatory authority.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to selecting measuring devices | <p>1.1 Contribute to determining WHS regulatory requirements and standards that apply to monitoring</p> <p>1.2 Consult with relevant individuals and/or parties to identify agents and/or conditions to be measured, according to organisational policies and procedures</p> <p>1.3 Identify characteristics of agents and/or conditions to be monitored</p> <p>1.4 Identify work area where measurements are to be taken</p> <p>1.5 Contribute to selecting measuring equipment according to agents and/or conditions, work environment, activities being carried out and level of risk to self and others present at time of monitoring</p> <p>1.6 Determine limits of own expertise and available equipment, and seek specialist advice and equipment as required</p> |
| 2. Contribute to preparing to collect workplace information and data | <p>2.1 Determine sampling process for data collection</p> <p>2.2 Contribute to outlining a sampling plan according to organisational policies and procedures</p> <p>2.3 Collect information and data about requirements, nature and purpose of monitoring</p> <p>2.4 Inspect work area and consult with workers and affected individuals and/or parties about nature of agents and/or conditions to be monitored</p> <p>2.5 Contribute to checking operability of equipment according to WHS laws, and organisational policies and procedures</p> |
| 3. Contribute to collecting workplace information and data | <p>3.1 Assist with arranging calibration of monitoring equipment where required</p> <p>3.2 Contribute to testing according to legislative requirements</p> <p>3.3 Use equipment to conduct sampling according to legislative requirements</p> <p>3.4 Ensure own health and safety and that of others present at the time of monitoring while collecting information and data</p> <p>3.5 Record readings according to organisational requirements, using expert support and advice as required</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| 4. Contribute to cleaning and storing equipment | <p>4.1 Participate in reinstating equipment and parts to pre-use condition, or dispose of appropriately</p> <p>4.2 Contribute to correctly storing reusable equipment, and/or making it ready for re-use as required, according to WHS laws, and organisational policies and procedures</p> |
| 5. Contribute to documenting and evaluating results of monitoring | <p>5.1 Assist with interpreting and evaluating results against a recognised standard and document results</p> <p>5.2 Use results to contribute to preparing reports on the monitoring process, including any WHS regulatory requirements</p> <p>5.3 Ensure that results and records are retained in an easily retrievable format according to WHS laws, and organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Interprets and analyses legal, organisational and technical texts relevant to monitoring |
| Writing | <ul style="list-style-type: none">Uses appropriate structure, layout and language for reporting and recording information about WHS monitoring in a clear and logical manner |
| Oral communication | <ul style="list-style-type: none">Uses structure and language suitable for audience to present or seek information about monitoring |
| Numeracy | <ul style="list-style-type: none">Uses units of measurement required for specific hazardsUses appropriate scales when using equipmentPerforms calculations to interpret sampling results |
| Navigate the world | <ul style="list-style-type: none">Adheres to legal and regulatory responsibilities in relation to own |

| Skill | Description |
|----------------------|---|
| of work | <p>WHS role and responsibilities</p> <ul style="list-style-type: none">Keeps up to date on changes to WHS laws relevant to own role |
| Interact with others | <ul style="list-style-type: none">Identifies what, with whom and how to communicate in the context of WHS monitoringCooperates with others as part of WHS monitoring processes, and contributes to specific activities requiring joint responsibility and accountabilityCollaborates with others to achieve individual and team outcomesOffers assistance, and shares information and resources voluntarily |
| Get the work done | <ul style="list-style-type: none">Determines priorities, sequences the steps for clearly defined tasks, and identifies and assembles resources required to plan for WHS monitoring within scope of own roleUses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteriaUses familiar digital systems and tools to access, organise, analyse and display information relevant to roleManages and maintains files securely in appropriate storage media and formats to enable retrieval according to legislative requirements |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS409 Assist with workplace monitoring processes.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS419 Contribute to implementing WHS monitoring processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to monitoring at least three different physical agents or conditions relating to work health and safety (WHS) typically found in the workplace.

During each of these occasions, the candidate must:

- identify regulatory requirements and standards that apply to monitoring physical agents and/or conditions relevant to WHS
- identify context of measurements to be undertaken, including:
 - physical agents and/or conditions to be measured and their characteristics
 - where measurements will be taken
 - area or space available
 - movements of people and equipment, tasks or activities being undertaken, number of persons occupying area, and other factors that may impact on the sampling or data-collection processes and the health and safety of self and others
 - physical features of equipment, such as emitting sources
- prepare and collect WHS data and information
- consult and communicate with individuals and parties regarding monitoring process
- seek expert advice, support and equipment as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of WHS information and data
- typical physical agents and/or conditions relevant to WHS, including:

- biological agents, such as insects, mites and bacteria
- electricity
- fibres, dusts and particulates
- fumes, mists, gases and vapours
- heat and humidity
- light
- noise
- radiation, including ionising, non-ionising and laser
- vibration
- aspects of WHS laws and standards relevant to using testing equipment and measuring physical agents and/or conditions and how they apply to the organisation
- mode of action of common physical agents and/or conditions on the body and how they produce discomfort and harm
- characteristics, modes of action and units of measurement for major physical agents and/or conditions
- environmental conditions that impact on measurements
- types of measuring and monitoring equipment and techniques for correct and safe use, including limitations on use and output, adjustment, maintenance and any in-built alarms
- personal communication strategies to facilitate engagement with workplace parties and individuals
- organisational policies and procedures for:
 - identifying physical agent and/or condition to be measured
 - determining sampling process and defining a plan
 - checking operability of equipment to ensure it meets organisational and work activity requirements
 - maintaining own health and safety and that of others present during process described in the performance evidence
 - reinstating equipment to pre-use condition, including for dismantling and cleaning equipment and parts
 - storing and re-using equipment
 - retaining results and records.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- measuring devices and equipment
- workplace equipment and resources
- WHS laws, licensing requirements and standards required to demonstrate the performance evidence

- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS431 Develop processes and procedures for controlling hazardous chemicals in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to develop processes and procedures for controlling hazardous chemicals in the workplace, and then monitoring their effectiveness. The unit requires the application of knowledge associated with work health and safety (WHS) legislation, and organisational policies and procedures relating to controlling hazardous chemicals.

The unit applies to those who work under supervision and use some discretion and judgement to respond to monitoring hazardous chemicals in the workplace. It applies to hazardous chemicals with the potential to harm human health, which may be solids, liquids or gases – pure substances or mixtures. When used in the workplace these substances often generate vapours, fumes, dusts and/or mists.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.
3. For the purposes of this unit of competency ‘safe systems of work’ refers to a formal procedure that results from systematic examination of a task in order to identify all the hazards. It defines safe methods to ensure that hazards are eliminated or, where this is not possible, risks are minimised.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to develop processes and procedures to control hazardous chemicals in the workplace | <p>1.1 Identify and source current WHS laws, and organisational policies and procedures relating to controlling hazardous chemicals</p> <p>1.2 Identify hazardous chemicals used in, or created by, workplace</p> <p>1.3 Identify workplace tasks involving hazardous chemicals</p> <p>1.4 Use safety data sheets (SDSs) and other guidance to determine potential worker exposure to identified hazardous chemicals</p> <p>1.5 Seek specialist advice during preparation phase, as required</p> |
| 2. Develop processes and procedures to control hazardous chemicals in the workplace | <p>2.1 Assess risks associated with identified hazardous chemicals</p> <p>2.2 Use information from workplace environmental monitoring to determine compliance with exposure standards, environmental requirements, storage specifications or associated risk management strategies</p> <p>2.3 Develop safe systems of work that include suitable risk control measures, and processes and procedures for those systems</p> <p>2.4 Seek and integrate feedback from required personnel about developed processes and procedures</p> <p>2.5 Communicate and promote developed processes and procedures to required personnel</p> |
| 3. Monitor effectiveness of processes and procedures developed to control hazardous chemicals in the workplace | <p>3.1 Review workplace implementation of control processes and procedures</p> <p>3.2 Identify non-compliance with control processes and procedures</p> <p>3.3 Implement training and development procedures and</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| | protocols to address areas of identified non-compliance |
| 4. Report on effectiveness of processes and procedures in controlling hazardous chemicals in the workplace | <p>4.1 Provide feedback on outcomes of workplace monitoring to required personnel</p> <p>4.2 Record outcomes of monitoring process and distribute to required personnel according to workplace policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Locates, interprets and analyses WHS legislative and workplace information about hazardous chemicals |
| Writing | <ul style="list-style-type: none"> Uses appropriate organisational formats and industry-specific vocabulary to document control processes and procedures |
| Oral communication | <ul style="list-style-type: none"> Uses structure and language suitable for audience to communicate information and contribute ideas about hazardous chemical control |
| Navigate the world of work | <ul style="list-style-type: none"> Adheres to legal and regulatory responsibilities, and organisational policies and procedures in relation to hazardous chemicals Keeps up to date on changes to WHS laws, and related organisational policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Cooperates with others and contributes to specific activities requiring joint responsibility and accountability |
| Get the work | <ul style="list-style-type: none"> Uses decision-making and problem-solving processes in |

| Skill | Description |
|-------|---|
| done | <p>hazardous chemicals monitoring: sets and clarifies goals, gathers information and checks compliance</p> <ul style="list-style-type: none">• Uses processes to monitor outcomes of processes and procedures to control hazardous chemicals in the workplace |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS431 Develop processes and procedures for controlling hazardous chemicals in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- on at least two different occasions, develop processes and procedures to control hazardous chemicals in the workplace.

During each of these occasions, the candidate must:

- identify hazardous chemicals in the workplace through inspections and consultation with required personnel
- monitor and report on implementation of control processes and procedures
- communicate requirements and compliance associated with hazardous chemicals in the workplace
- comply with work health and safety (WHS) requirements for hazardous chemical monitoring
- implement training and development opportunities to address non-compliance
- identify WHS duty holders and their duties, and seek specialist advice as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- range of common workplace hazardous chemicals and the origin and nature of associated harm
- requirements for controlling hazardous chemicals as specified in:
 - relevant WHS laws, licences and permit conditions
 - organisational WHS policies, procedures, processes and systems

- documentation about the safe use, handling, processing, storage, transportation, and disposal of hazardous chemicals in the workplace, including safety data sheets (SDSs)
- risk control processes and procedures, including:
 - identifying hazards and assessing risks
 - responding to incidents involving hazardous chemicals
- organisational policies and procedures for:
 - accessing internal and external sources of WHS information and data
 - recording outcomes of monitoring process and distributing to required personnel according to workplace policies and procedures
- key features and components of controls for hazardous chemicals in the workplace, including:
 - workplace register for hazardous chemicals
 - labelling of hazardous chemicals
 - workplace signposting
 - current and complete SDSs for hazardous chemicals in the workplace
 - risk controls in line with the hierarchy of control measures
 - safe work practices that eliminate, or where this is not possible, minimise risks
- emerging issues about hazardous chemicals and identifying potential risks from exposure to hazardous chemicals
- hierarchy of control measures suited to identified hazardous chemicals
- training and development procedures and protocols.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, standards and guidelines required to demonstrate the performance evidence
- organisational policies, procedures, processes and systems required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS504 Manage WHS risks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to conduct work health and safety (WHS) risk management processes.

It applies to individuals who manage WHS risks, based on the organisation's WHS management system (WHSMS), WHS information system (WHSIS) and risk-management approach (as covered in BSBWHS503 Contribute to the systematic management of WHS risk). These individuals will work in a range of WHS roles across all industries and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTE: The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Access information and | 1.1 Identify sources of information and data |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| data on WHS hazards and risk management | <p>1.2 Obtain information and data to determine the nature and scope of hazards, the range of harms they may cause, and how these harms are caused</p> <p>1.3 Obtain information and data to determine techniques, tools and processes to assess risk associated with identified hazards, and identify risk control options</p> |
| 2 Prepare to manage WHS risks | <p>2.1 Apply knowledge of the organisation's WHSMS and WHSIS to identify WHS risk management requirements</p> <p>2.2 Apply knowledge of WHS legislation to identify duty holders and legislative requirements for WHS risk management</p> |
| 3 Develop and implement WHS risk-management processes | <p>3.1 Apply techniques, tools and processes to identify hazards, assess associated risks and identify risk control options</p> <p>3.2 Apply knowledge of hazards and risks to select appropriate risk controls</p> <p>3.3 Develop and implement a risk control plan and evaluate risk controls</p> <p>3.4 Carry out hazard identification and risk management according to organisational and legal requirements</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|----------------------|---|
| Reading | 1.1, 1.2, 1.3 | <ul style="list-style-type: none"> Organises, interprets evaluates and critiques ideas and information in relation to WHS risk management |
| Writing | 3.1, 3.2, 3.3, 3.4 | <ul style="list-style-type: none"> Uses industry specific terminology and appropriate formats to draft and develop risk control plans and processes Records results of risk-management processes according to organisational requirements |
| Navigate the world of work | 2.1, 2.2, 3.4 | <ul style="list-style-type: none"> Monitors adherence to legal, regulatory and organisational rights and responsibilities for self and others in relation to WHS risk management |

| | | |
|----------------------|-------------------------|--|
| Interact with others | 3.1, 3.2, 3.3 | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and taking a leadership role when required |
| Get the work done | 1.2, 1.3, 3.1, 3.2, 3.3 | <ul style="list-style-type: none"> Uses logical planning processes, and an increasingly intuitive understanding of context, to identify relevant information and risks, and to identify and evaluate strategies and resources for risk management planning Sequences and schedules complex activities, monitors implementation, and manages relevant communication in relation to risk management planning Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, identifying and evaluating options against agreed criteria Uses common digital systems and tools to locate and store information |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|--|--|--------------------|
| BSBWHS504 Manage WHS risks | BSBWHS504A Manage WHS hazards and risks | Updated to meet Standards for Training Packages. Title change | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS504 Manage WHS risks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- access information and data on hazards and how to manage associated risks
- identify duty holders and legislative requirements for work health and safety (WHS) risk management
- use the organisation's WHS management system (WHSMS) and WHS information system (WHSIS) to conduct the following risk management processes:
 - identify hazards and potential hazards
 - assess the associated risks
 - identify control options
 - select suitable options
 - develop and implement a risk control plan
 - evaluate risk controls
- carry out hazard identification and risk management.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe the basic principles of workplace incident, injury and disease causation
- explain the meanings of 'hazard' and 'risk' and how they differ
- identify formal and informal communication and consultation processes and key personnel related to communication
- describe how the characteristics and composition of the workforce impact on WHS risk and the management of WHS, including:
 - communication skills
 - cultural background and diversity

- gender
- labour market changes
- language, literacy and numeracy levels of the workforce
- structure and organisation of the workforce, including part-time, casual and contract workers; shift rosters and geographical location
- workers with specific needs and limitations
- workplace culture in relation to alcohol and other drug use
- identify internal and external sources of WHS information and data and how to access them
- explain the limitations of generic hazard identification and risk assessment checklists and risk ranking processes
- outline methods for providing evidence of compliance with WHS legislation
- describe the nature of workplace processes (work flow, planning and control) and hazards relevant to the workplace
- describe organisational culture as it impacts on the work team
- summarise organisational WHS policies, procedures, processes and systems
- list other functional areas that impact on the management of WHS
- outline the principles and practices of a systematic approach to managing WHS
- outline Commonwealth and state or territory WHS Acts, regulations, codes of practice, standards and guidance material and other publications relevant to the organisation
- outline risk management as a duty of persons conducting businesses or undertakings or officers under WHS legislation
- describe the roles and responsibilities of individuals and parties under WHS legislation
- outline standard industry controls for a range of hazards
- identify techniques, tools and processes for identifying health and safety hazards and assessing and controlling the associated risks, including:
 - hazard and risk checklists
 - hazard hunts
 - job safety analyses
 - manifests and registers, including for dangerous goods, hazardous chemicals and plant
 - safe work method statements
 - surveys using questionnaires, interviews and other survey techniques
 - workplace inspections and walk-throughs.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals carrying out work health and safety duties in the workplace and include access to:

- workplace policies and procedures
- office equipment and resources
- relevant Acts, regulations, codes of practice, standards and guidelines relating to risks found in the workplace

- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS512 Contribute to managing work-related psychological health and safety

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to managing work-related psychological health and safety. It requires the ability to identify psychosocial hazards, assess their risk, and implement control methods for psychosocial hazards that apply in the workplace.

The unit applies to those with work health and safety (WHS) supervisory responsibilities who work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia (SWA) for further information.
3. Safe Work Australia national guidance material refers to ‘psychosocial hazards or factors’ as ‘anything in the design or management of work that increases the risk of work-related stress’ and states that ‘work-related stress if prolonged and/or severe can cause both psychological and physical injury’. (SWA, *Work-related psychological health and safety: A systematic approach to meeting your duties*)

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish requirements for managing work-related psychological health and safety | 1.1 Review and analyse legislative requirements applicable to psychological health and safety 1.2 Determine workplace responsibilities relating to psychological health and safety 1.3 Determine roles and responsibilities of stakeholders in relation to managing psychological health and safety |
| 2. Record work-related psychosocial hazards in the workplace | 2.1 Identify work-related psychosocial hazards in own workplace, and factors contributing to them 2.2 Access and store information, data and advice to assist with identifying work-related psychosocial hazards according to legislative requirements 2.3 Consult with workers and other required stakeholders to confirm identified work-related psychosocial hazards 2.4 Develop and maintain a register of identified work-related psychosocial hazards according to legislative requirements |
| 3. Assess risk of identified work-related psychosocial hazards | 3.1 Identify and consult with individuals and/or parties who should participate in risk assessment of identified work-related psychosocial hazards 3.2 Assess frequency and duration of exposure to identified work-related psychosocial hazards, and determine severity of risk 3.3 Record psychosocial risk assessment according to organisational policies and procedures |
| 4. Contribute to implementing risk controls for risks associated with identified work-related psychosocial hazards | 4.1 Contribute to determining required risk controls for identified work-related psychosocial hazards according to the hierarchy of control measures 4.2 Contribute to selecting risk controls that address identified work-related psychosocial hazards and control risks 4.3 Communicate selected risk controls to required stakeholders according to organisational policies and |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| | procedures |
| 5. Review effectiveness of risk controls for managing work-related psychological health and safety | <p>5.1 Establish strategy and timeframe for reviewing risk controls for identified work-related psychosocial hazards</p> <p>5.2 Consult with individuals and/or parties to review risk controls</p> <p>5.3 Evaluate effectiveness of risk controls and document areas for improvement</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and critically analyses texts when contributing to work-related psychological health and safety Constructs meaning from texts to assist in promoting work-related psychological health and safety |
| Writing | <ul style="list-style-type: none"> Develops risk registers, reports and associated documentation according to organisational requirements Uses vocabulary, grammatical structure and conventions appropriate to text when developing risk registers, reports and other documentation |
| Oral communication | <ul style="list-style-type: none"> Asks questions and actively listens to gather information about potential risk situations Provides information during or after work-related psychological health and safety response situations using structure and language appropriate to the audience |
| Navigate the world of work | <ul style="list-style-type: none"> Contributes to broader goals in work-related psychological health and safety contexts Identifies own legal rights and responsibilities, and general legal principles in relation to work-related psychological health and safety contexts Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications in work-related psychological health and safety contexts |
| Interact with others | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction |

| Skill | Description |
|-------------------|--|
| | <ul style="list-style-type: none">• Supports, consults and liaises with others in work-related psychological health and safety situations |
| Get the work done | <ul style="list-style-type: none">• Formulates plans and monitors actions against stated goals, adjusting plans and resources to cope with contingencies• Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates several choices to determine appropriate actions and responses• Applies problem-solving processes when identifying actions required for work-related psychological health and safety• Documents outcomes and feedback from others in order to identify general principles and concepts that may be applicable in new situations• Identifies the potential of new approaches to enhance work practices and outcomes |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS512 Contribute to managing work-related psychological health and safety

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to managing at least two different work-related psychological health and safety issues.

During the above, the candidate must:

- identify legislative requirements and workplace responsibilities
- collect, document and analyse relevant information and data to assist with identifying work-related psychosocial hazards according to organisational policies and procedures, including those relating to privacy and confidentiality
- identify potential work-related psychosocial hazards, with input from others, and document them in a risk register
- record at least two psychosocial risk assessments
- determine options for addressing identified work-related psychosocial hazards or minimising the risk
- evaluate effectiveness of existing risk controls and document areas for their improvement, identifying when a review of risk controls is needed.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- legislative requirements relating to work-related psychological health and safety:
 - duty of care
 - due diligence
 - privacy and confidentiality

- organisational policies, procedures, processes and systems relating to work-related psychological health and safety:
 - collecting, documenting and analysing information and data relevant to work-related psychosocial hazards
 - communicating control methods for work-related psychosocial hazards
 - personal protective equipment (PPE) requirements
 - reporting procedures
 - recordkeeping procedures and prescribed period for keeping records
 - privacy and confidentiality
- techniques and procedures for identifying common work-related psychosocial hazards and factors contributing to them:
 - level of job demands, job control, support, workplace relationships, role clarity, recognition and reward, organisational change management, organisational justice, and environmental conditions
 - remote work and isolated work
 - violent and traumatic events, including secondary and vicarious trauma
- internal and external sources of WHS information and data, and procedures for accessing them
- key personnel who contribute to managing work-related psychological health and safety
- common work-related psychological health and safety controls
- elements of a WHS management system that relate to work-related psychological health and safety
- methods of collecting valid and reliable work-related psychological health and safety information
- roles and responsibilities of WHS personnel
- WHS information needs of individuals and/or parties.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS513 Lead WHS risk management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to lead the management of work health and safety (WHS) risks in an organisation. The unit includes facilitating the identification of hazards and potential hazards, leading the assessment of associated risks, selecting and implementing suitable risk controls, and evaluating the overall effectiveness of the organisational WHS risk management process. It involves communicating with stakeholders throughout the process.

The unit applies to those in an organisation who provide specialised knowledge and guidance to a range of personnel when leading the management of WHS risks.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Facilitate identification of WHS risk management requirements | 1.1 Identify and review internal and external sources of WHS information and data that apply to risk management processes 1.2 Identify legislative requirements for WHS risk management 1.3 Identify duty holders, individuals and/or parties to consult about and participate in risk management processes, according to organisational and legislative requirements 1.4 Identify and communicate roles and responsibilities of individuals and/or parties that impact on risk management 1.5 Identify organisation-specific factors that will impact on hazard identification, risk assessment and risk controls 1.6 Confirm that risk management scope is clearly defined according to organisational policies and procedures |
| 2. Lead risk assessment | 2.1 Lead hazard identification process according to organisational policies and procedures 2.2 Identify and document risk factors as they apply to identified hazards according to organisational policies and procedures 2.3 Apply knowledge of WHS laws, workplace WHS information and data, and identified hazards and risk factors to analyse and assess risk 2.4 Document risk assessment according to organisational policies and procedures, and legislative requirements 2.5 Communicate outcomes of risk assessment to required personnel according to organisational and legislative requirements |
| 3. Lead risk control | 3.1 Identify organisational risk control policies and procedures appropriate to identified hazards 3.2 Select suitable risk controls according to assessed level of risk, organisational WHS hazard and risk control policies and procedures, and WHS laws 3.3 Plan to implement selected risk controls according to organisation's WHS management system (WHSMS) and WHS information system (WHSIS) 3.4 Implement selected risk controls according to organisational policies and procedures |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| | 3.5 Document and communicate selected risk controls to required personnel, according to organisational and legislative requirements |
| 4. Evaluate effectiveness of WHS risk management process | <p>4.1 Establish nature and scope of evaluation process and key performance indicators</p> <p>4.2 Review effectiveness of implemented risk management process according to organisation's WHSMS and legislative requirements</p> <p>4.3 Modify risk management process as required in response to evaluation</p> <p>4.4 Document risk management process according to WHSIS requirements</p> <p>4.5 Communicate evaluation findings according to organisational requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Organises, analyses and integrates information from a range of sources |
| Writing | <ul style="list-style-type: none">Documents results of investigations using clear and comprehensible language and layout |
| Oral Communication | <ul style="list-style-type: none">Uses listening and questioning techniques to clarify understanding of others' viewsPresents information with varying level of technical vocabulary to suit audience |
| Numeracy | <ul style="list-style-type: none">Collates, interprets and compares mathematical and statistical information relevant to requirements |
| Navigate | <ul style="list-style-type: none">Considers legal and regulatory |

| Skill | Description |
|----------------------|---|
| the world of work | <p>responsibilities when implementing, monitoring or reviewing risk-management processes</p> <ul style="list-style-type: none">Leads effective consultation and participation during all stages of WHS risk-management process |
| Interact with others | <ul style="list-style-type: none">Identifies and uses appropriate conventions and protocols when communicating with othersPlays a lead role in situations requiring effective collaboration skills, demonstrating the ability to guide discussions and outcomes |
| Get the work done | <ul style="list-style-type: none">Develops plans or processes to manage WHS risk management tasks, with an awareness of how they contribute to operational and strategic goalsDetermines whether, and how, others should be involved, using consultative or collaborative processes as an integral part of the decision-making processApplies problem-solving processes to determine solutions to WHS risk management issuesUses analytical and lateral thinking to review practices and suggest improvementsUses a range of digitally-based technology and applications to access, organise and share relevant information in effective ways |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS503 Contribute to the systematic management of WHS risk.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS513 Lead WHS risk management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- plan, implement and evaluate a systematic process for managing work health and safety (WHS) risk in a work area.

During the above, the candidate must:

- identify, interpret and apply information from a range of sources, including organisational and legislative requirements
- review WHS risk-management process according to established scope and key performance indicators
- consult effectively with required stakeholders using appropriate interpersonal communication skills.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory WHS laws relating to WHS risk management, including WHS Acts, regulations, codes of practice and standards
- WHS information and data that applies to WHS risk-management process, including:
 - organisational and duty holder legal requirements
 - organisational policies and procedures relating to identifying hazards, assessing risks and implementing risk controls
 - key components of the work health and safety management system (WHSMS)
- internal and external sources of WHS information and data, and procedures for accessing them

- organisational behaviour and culture in relation to WHS risk management activities and their impact on WHS and the work team, including organisation's risk appetite
- key components of effective consultation and participation strategies
- tools and techniques to:
 - identify health and safety hazards
 - assess risks, taking into account nature and impact of risk, and likelihood of risk arising
 - identify and select suitable risk controls
 - facilitate effective communication and consultation processes, and identify key personnel related to communication
- application and limitations of techniques and tools for identifying hazards, and analysing and assessing risks
- hierarchy of control measures:
 - its use in establishing level of risk
 - factors limiting effectiveness of types of controls
 - role and limitations of procedural controls
 - use of personal protective equipment
- other functional areas in the organisation that impact on the management of WHS-related risks
- impact of workforce characteristics and composition on WHS risk and its management, including:
 - cultural background/diversity
 - gender
 - labour market changes
 - levels of language, literacy and numeracy skills in the workforce
 - workforce structure and organisation, including part-time, casual and contract workers, shift rosters and geographical location
 - workers with specific support needs and limitations
 - workplace cultural attitudes towards alcohol and other drug use
- principles of decision-making.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS514 Manage WHS compliance of contractors

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to lead and coordinate organisational arrangements for managing the work health and safety (WHS) compliance of contractors. It involves determining the WHS legislative and organisational requirements applicable to contractors, and managing compliance of contractors.

The unit applies to those in managerial positions overseeing functions within organisations across all industries that are supplied with services by contractors, including labour hire and temporary workers, cleaning, catering, security, maintenance, repairs, installations and alterations, and major contracts and projects, as relevant to the organisation. This includes casual and volunteer workers. It does not cover visitors, or outworkers or suppliers of goods, materials or products to workplaces.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish and communicate WHS requirements in relation to contractors | 1.1 Analyse scope of contractor services and applicable WHS legislative and organisational requirements 1.2 Determine organisation-specific WHS requirements and guidance that relate to contractor services 1.3 Establish WHS key performance indicators (KPIs) relating to contracted services according to organisational policies and procedures 1.4 Document established WHS requirements according to organisational policies and procedures 1.5 Communicate WHS requirements to contractor according to organisational policies and procedures |
| 2. Monitor contractor compliance with established WHS requirements | 2.1 Review services being provided by contractor for compliance with WHS requirements and established KPIs 2.2 Identify and investigate contractor non-compliance with WHS requirements and WHS KPIs 2.3 Discuss and agree with contractor required response in relation to identified non-compliance according to organisational policies and procedures 2.4 Document agreed response to non-compliance according to organisational policies and procedures |
| 3. Review WHS requirements in relation to contractors | 3.1 Make necessary adjustments to organisation-specific WHS requirements and guidance that relate to contractor services 3.2 Seek feedback on revised WHS requirements and guidance 3.3 Distribute updated contractor WHS requirements to required personnel according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and analyses legal and organisational texts relevant to contractor WHS arrangements |
| Writing | <ul style="list-style-type: none"> Uses structure, layout and language suitable for a range of audiences when preparing WHS KPIs, and WHS guidance and induction documentation |
| Oral communication | <ul style="list-style-type: none"> Uses language suitable for audience to present information, offer opinions and discuss WHS contractor arrangements |
| Navigate the world of work | <ul style="list-style-type: none"> Adheres to WHS legal and regulatory responsibilities, and organisational policies and procedures Keeps up to date on changes to WHS laws, and organisational policies and procedures relevant to own role and responsibilities |
| Interact with others | <ul style="list-style-type: none"> Cooperates with others as part of contractor WHS arrangement processes Identifies what, with whom and how to communicate when managing WHS arrangements for contractors |
| Get the work done | <ul style="list-style-type: none"> Determines priorities, and sequences the steps, in clearly defined tasks Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates choices against a set of criteria |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS514 Manage WHS compliance of contractors

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- manage the work health and safety (WHS) compliance of at least two different contractors, each providing different services.

During the above, the candidate must:

- establish WHS requirements specific to the contracted services
- review and address contractor compliance
- review and improve organisational approach to leading WHS arrangements for contractors.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- duties, rights and obligations of:
 - contractors as specified in relevant WHS laws, and organisational WHS policies and procedures about supplying services
 - managers in relation to contractor WHS arrangements, including those relating to required resources and equipment
- internal and external sources of information and data relevant to contractor WHS arrangements, and procedures for accessing them
- contractor WHS compliance requirements included in:
 - tender documentation, including requirements for subcontracting
 - contractor selection processes and guidelines
 - contract documentation, including nature, scope and location of services to be provided, and requirements for subcontracting

- induction processes
- procedures and protocols for establishing WHS-related lead and lag key performance indicators (KPIs), and measuring contractor performance against them
- organisational WHS policies, procedures, processes and systems relating to contractor services and WHS requirements, including those for:
 - establishing and documenting WHS KPIs relating to contracted services
 - communicating WHS requirements to contractors
 - agreeing on and documenting required response in relation to non-compliance
 - distributing contractor WHS requirements to required personnel.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws and data required to demonstrate the performance evidence
- workplace equipment and resources
- case studies or, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS515 Lead initial response to and investigate WHS incidents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to lead the initial response to work health and safety (WHS) incidents. The unit also includes planning, conducting and reporting on investigations of WHS incidents that have resulted in, or have the potential to result in, injury or damage. This may include accessing specialist expertise.

The unit applies to those who work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts. It does not apply to those undertaking an investigation in order to provide legal advice or prepare for legal proceedings.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Lead the initial response to incident | 1.1 Identify required initial response to incident according to established organisational response plan 1.2 Implement initial response according to plan, and organisational and legislative requirements 1.3 Confirm sufficiency and suitability of implemented initial response 1.4 Consult individuals and/or parties according to organisational policies and procedures |
| 2. Develop and resource an incident investigation plan | 2.1 Identify duty holders according to WHS laws and workplace policies, procedures and systems 2.2 Define scope and purpose of investigation appropriate to nature and scope of incident 2.3 Identify, document and secure required human and other resources appropriate to nature and scope of incident, including expert advice as required 2.4 Ensure participation of, and consultation with, required stakeholders, and determine agreed processes for investigation 2.5 Identify, address and document potential barriers to investigation according to organisational requirements 2.6 Document incident investigation plan according to organisational and WHS legislative requirements |
| 3. Collect incident information and data | 3.1 Identify and access relevant and reliable sources of incident information and data according to organisational policies and protocols, suitable causation model and legislative requirements 3.2 Inspect incident site, equipment and other evidence according to investigation plan, organisational procedures and legislative requirements 3.3 Present collected information and data in required format |
| 4. Lead an incident investigation that is not part of providing legal advice or preparing for legal | 4.1 Brief investigation team on investigation requirements and incident causation model 4.2 Construct and document timeline of events leading up |

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| proceedings | <p>to incident</p> <p>4.3 Coordinate investigation of key events, conditions and/or circumstances that contributed to incident</p> <p>4.4 Develop recommendations, interventions and practical measures for investigation report</p> |
| 5. Record and report WHS incident investigation | <p>5.1 Document investigation evidence and basis for conclusions and recommendations</p> <p>5.2 Prepare investigation report according to organisational procedures and WHS legislative requirements</p> <p>5.3 Implement organisational and WHS legislative recordkeeping protocols and procedures in relation to investigation report</p> <p>5.4 Communicate report to required individuals and/or parties according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Reviews and interprets WHS legislative texts relating to WHS incidents Analyses reports and other material to determine required course of action |
| Writing | <ul style="list-style-type: none"> Documents procedures, plans and outcomes using appropriate organisational formats and industry-specific terminology Develops reports using structure, format and language appropriate for report purpose and audience |
| Oral communication | <ul style="list-style-type: none"> Uses appropriate language and non-verbal features to provide support, give instructions or |

| Skill | Description |
|----------------------------|--|
| Communication | <ul style="list-style-type: none"> request information Listens closely to extract main ideas and to evaluate initial responses for accuracy and validity |
| Numeracy | <ul style="list-style-type: none"> Extracts and evaluates the numerate and graphical information embedded in sources of incident information and data Performs calculations in relation to resource requirements, timelines and evaluation measures, and the impact and implications of incidents |
| Navigate the world of work | <ul style="list-style-type: none"> Develops, implements or modifies workplace procedures applicable to investigation contexts Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work |
| Interact with others | <ul style="list-style-type: none"> Identifies and uses appropriate conventions and protocols when communicating with parties involved in various investigation stages Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction Takes a leadership role in developing team understanding of investigation requirements |
| Get the work done | <ul style="list-style-type: none"> Uses logical planning processes and understanding of context to: <ul style="list-style-type: none"> identify relevant information and risks identify and evaluate alternative strategies and resources for investigation processes Sequences and schedules complex activities, monitors implementation and manages relevant |

| Skill | Description |
|-------|---|
| | <p>communication</p> <ul style="list-style-type: none">• Uses analytical processes to review plans and seeks input and advice from others before taking necessary action• Uses digital systems and tools for data collection and analysis, and communication and reporting |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS505 Investigate WHS incidents.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS515 Lead initial response to and investigate WHS incidents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- lead the initial response to one work health and safety (WHS) incident that complies with legislative and organisational requirements
- prepare, record and communicate incident investigation report that addresses immediate and underlying causes of incident and recommends practical prevention measures, according to organisational and WHS legislative requirements.

During the above, the candidate must:

- systematically develop and document a plan to investigate the incident
- collect, use and document information and data relevant to incident investigation
- establish key events, conditions and/or circumstances that contributed to the incident
- identify actions required to respond to the incident, including any recommendations for changes to WHS arrangements.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws applicable to WHS incidents and their investigation
- organisational WHS policies, procedures, processes, systems, roles and responsibilities relating to responding to and investigating WHS incidents:
 - incident response plan that meets legislative and organisational requirements
 - protocols and procedures for investigation, including preserving incident site as required
 - protocols for maintaining objectivity, confidentiality, privacy and commercial requirements during investigation of WHS incident

- information and data collection procedures that ensure their validity, admissibility and accuracy
- due diligence and duty of care requirements when investigating WHS incidents
- required format for reporting incident investigations
- common industry-accepted causation models, and their use in informing data collection and analysis
- internal and external sources of WHS information and data relevant to WHS incident investigations
- key components of incident investigation plan, including:
 - duty holders, expert advisers and key stakeholders appropriate to incident
 - agreed timelines, objectives, responsibilities, roles, documentation, actions and outcomes
 - levels of accountability
 - protocols for ensuring privacy and sensitivity throughout investigation
- key components of investigation report, including:
 - identified incident root causes
 - recommended actions, interventions and practical measures arising from investigation
 - plans for implementing and evaluating recommendations
- techniques and tools for gathering information relating to incident investigation, including:
 - questioning and active listening
 - information collection
 - accurate note taking
- types and characteristics of WHS incidents and suitable incident response processes.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to the development, implementation and maintenance of elements of a work health and safety management system (WHSMS). WHSMSs support organisations in systematically managing work health and safety (WHS) in the workplace. WHSMSs consist of a documented set of plans, actions and procedures that target improvements.

The unit applies to those with organisational responsibilities for contributing to tasks in relation to elements of a WHSMS appropriate to the nature and scale of the organisation and its WHS risks. These people will have supervisory responsibilities, work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to developing WHSMS | <p>1.1 Access and analyse sources of information to determine required form, content, purposes and functions of WHSMS</p> <p>1.2 Identify duty holders and their roles and responsibilities in WHSMS, according to WHS laws</p> <p>1.3 Document organisational WHSMS that meets legal and organisational requirements</p> <p>1.4 Consult with individuals and parties about what the WHSMS should include and integrate their feedback as required</p> <p>1.5 Communicate information about WHSMS to required personnel</p> |
| 2. Contribute to developing WHSMS implementation plan | <p>2.1 Identify key components of plan that meet legal and organisational requirements</p> <p>2.2 Facilitate and support consultation with, and participation of, required personnel in plan development</p> <p>2.3 Contribute to developing draft plan according to organisational policies and procedures</p> <p>2.4 Seek feedback on draft plan</p> <p>2.5 Finalise and record plan according to organisational policies and procedures</p> |
| 3. Support implementation of WHSMS | <p>3.1 Consult with colleagues on WHSMS implementation and agree on required timeframe and resources</p> <p>3.2 Communicate benefits of WHSMS and agree on management roles and responsibilities in supporting its implementation</p> <p>3.3 Identify and address potential barriers to WHSMS implementation according to organisational policies and procedures</p> |
| 4. Contribute to measuring and evaluating WHSMS performance | <p>4.1 Communicate requirements for measuring and evaluating WHSMS performance to required personnel according to organisational requirements</p> <p>4.2 Facilitate and support consultation with, and participation of, required personnel in measuring and</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|----------------------------------|---|
| | <p>evaluating WHSMS performance</p> <p>4.3 Evaluate WHSMS performance outcomes according to established protocols</p> <p>4.4 Analyse and document outcomes of evaluation process</p> |
| 5. Contribute to review of WHSMS | <p>5.1 Gather and analyse required review documentation according to organisational policies and procedures</p> <p>5.2 Facilitate and support consultation with, and participation of, required personnel to identify opportunities to improve WHSMS</p> <p>5.3 Contribute to identifying required changes to WHSMS</p> <p>5.4 Contribute to adjusting WHSMS as required according to organisational policies and procedures</p> <p>5.5 Seek approval of updated WHSMS from required personnel</p> <p>5.6 Distribute information about approved updated WHSMS according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies, interprets and critically analyses texts in relation to WHSMS information and WHSMS review documentation |
| Writing | <ul style="list-style-type: none"> Matches style of writing to purpose and audience in consulting, developing and communicating WHSMS and WHS policy Uses appropriate layout, vocabulary, grammatical structure and conventions in consulting, developing and communicating WHSMS and WHS policy |
| Oral communication | <ul style="list-style-type: none"> Presents information about WHSMS and WHS policy using structure and language appropriate to the audience Uses questions and active listening to extract main ideas, gather information and feedback, and seek and offer opinions |
| Numeracy | <ul style="list-style-type: none"> Selects from and applies an expanding range of mathematical and problem-solving strategies in relation to WHSMS measurement and evaluation |

| Skill | Description |
|----------------------------|--|
| Navigate the world of work | <ul style="list-style-type: none">• Accepts responsibility for developing, implementing or modifying workplace policies and procedures applicable to WHSMS• Keeps up to date on changes to WHS laws and regulations relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work |
| Interact with others | <ul style="list-style-type: none">• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction |
| Get the work done | <ul style="list-style-type: none">• Sequences and schedules activities, monitors implementation and manages relevant communication in relation to WHSMS planning• Uses systematic and analytical processes in non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria in review and evaluation of WHSMS• Uses digital systems and tools in the context of plan implementation and measurement, and evaluation of WHS performance |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS506 Contribute to developing, implementing and maintaining WHS management systems.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- contribute to developing, implementing, reviewing and improving a work health and safety management system (WHSMS) for an organisation.

During the above, the candidate must:

- communicate and explain the WHSMS and associated implementation plan to others to facilitate their contribution and ensure their commitment to the system
- apply effective consultation and communications processes and protocols
- use suitable and sufficient tools to measure and evaluate WHSMS performance.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory WHS laws, guidance material and publications relating to developing and implementing WHSMS
- organisational requirements for WHSMS:
 - commitment from line management and supervisors to provide leadership in WHS and prioritise WHS as part of operational planning and activity
 - compliance with required policies, procedures, processes, and tools
 - requirements for recordkeeping that address WHS, privacy and other relevant legislation
- elements of effective WHSMS with reference to required commonwealth and state/territory WHS Acts, regulations, codes of practice and standards, including:
 - policies and procedures

- WHSMS certification standards
- duty holders and their responsibilities
- consultation and communication arrangements
- required training and induction
- WHS risk assessment, including risk controls
- sources of information to determine required form, content, purposes and functions of WHSMS to be developed and implemented
- key components of WHSMS plan:
 - required resources to implement plan within set timeframes
 - management roles and responsibilities in supporting WHSMS implementation and operation
 - roles and responsibilities of individuals and parties under WHS laws
 - procedures, protocols and tools for measuring WHS performance, including WHS-related lead and lag key performance indicators (KPIs)
- barriers to implementing WHSMS, and strategies to address them
- benefits to an organisation of having a WHSMS, and an integrated return-to-work and injury management program
- instruments issued by WHS regulators and how they apply to the organisation
- duties, rights and obligations of individuals and parties under WHS laws.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS517 Contribute to managing a WHS information system

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to contribute to managing a work health and safety information system (WHSIS) that supports the effective management of WHS. It involves accessing, collecting and analysing WHS information and data; evaluating the effectiveness of the WHSIS and contributing to improving the management of WHS; and communicating the change.

The unit applies to those who contribute to managing a WHSIS. These people work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts. Individuals will apply skills and knowledge to enable them to manage information and data management processes, including analysis of the data. They are not required to design the actual information system or process.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Facilitate collection of workplace information and data | <p>1.1 Access sources of WHS information and data according to organisational policies and procedures</p> <p>1.2 Collect and record WHS information and data according to WHS laws, and organisational policies and procedures</p> <p>1.3 Meet legislative requirements for reporting to external bodies within required timeframes</p> <p>1.4 Record and store collected WHS information and data according to WHS laws, and organisational policies and procedures</p> |
| 2. Contribute to operating the WHSIS | <p>2.1 Provide advice and support to users to enable them to use the WHSIS, and meet their WHS responsibilities and objectives</p> <p>2.2 Identify training and development needs of WHSIS users, and take action as required to facilitate the required training within scope of own role</p> |
| 3. Contribute to reviewing WHSIS effectiveness | <p>3.1 Determine required frequency, method and scope of WHSIS review in consultation with users</p> <p>3.2 Facilitate user participation and consultation during WHSIS monitoring, evaluation and improvement activities</p> <p>3.3 Review and analyse accuracy, currency and relevance of WHS information and data in consultation with users</p> <p>3.4 Apply knowledge of WHSIS requirements to assist with identifying WHSIS elements needing improvement</p> |
| 4. Contribute to improving WHS management | <p>4.1 Make recommendations for system improvements based on analysis of WHS information and data</p> <p>4.2 Assist with developing measures to improve WHSIS and seek required approval</p> <p>4.3 Communicate changes to WHSIS according to WHS laws, and organisational policies, procedures and systems</p> <p>4.4 Assist with implementing improvement measures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets and critically analyses texts relating to WHSIS and applies appropriate strategies to construct meaning |
| Writing | <ul style="list-style-type: none"> Matches style of writing to purpose and audience Uses appropriate layout, vocabulary and grammatical structure for reporting on WHSIS performance or improvements |
| Oral communication | <ul style="list-style-type: none"> Presents information about WHSIS and WHS policy using structure and language appropriate to the audience Uses questions and active listening to extract main ideas and clarify understanding |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical and statistical information to extract reports and monitor effectiveness of WHS management Uses appropriate visual/graphical displays to present WHS performance information |
| Navigate the world of work | <ul style="list-style-type: none"> Meets reporting requirements according to organisational policies and procedures Keeps up to date on changes to legislation or regulations relevant to own role and responsibilities, and considers their implications in relation to WHSIS |
| Interact with others | <ul style="list-style-type: none"> Collaborates with others to gather valid and reliable data, playing an active role in facilitating effective group interaction Provides feedback to others in forms they can engage with and respond to |
| Get the work done | <ul style="list-style-type: none"> Plans, organises and implements tasks required to operate the WHSIS, using a range of technology and software systems Extracts and analyses information and collates related reports Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates several choices against a limited set of criteria in identifying training needs of system users Applies problem-solving processes to identify WHSIS improvements, resolving complex issues in manageable parts, and identifying and evaluating available options for action Seeks feedback and advice before implementing a solution Uses digital systems and tools, and operates them effectively to complete WHSIS-related tasks, such as developing graphs and charts |

Unit Mapping Information

No equivalent unit.

Supersedes and is equivalent to BSBWHS507 Contribute to managing WHS information systems.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS517 Contribute to managing a WHS information system

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- collect, analyse, record and store a set of work health and safety (WHS) information and data
- provide advice and support on operation of a WHS information system (WHSIS) to at least three different system users, and action their identified training needs within scope of own role
- use the WHSIS to generate at least one report to an external body within required timeframes
- contribute to identifying and implementing an improvement measure for a WHSIS based on analysis of information and data, and communicate measures to required personnel according to WHS legislative and organisational requirements.

During the above, the candidate must:

- follow WHS legislative requirements and organisational policies and procedures
- consult with, advise and support system users.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS information and data relevant to organisation and its needs (which is a function of the size and nature of the organisation), and to specific hazards in the workplace
- commonwealth and state/territory WHS legislative requirements relating to:
 - roles and responsibilities of individuals and parties in relation to WHSIS
 - consultation
 - collecting, recording and storing WHS information and data

- privacy and confidentiality
- legislative and organisational requirements of a WHSIS:
 - duty holders and roles
 - WHS information for effective WHS management
 - functions and purposes
 - user needs
 - workplace-specific factors
 - internal and external sources of WHS information and data
- nature of information and data that provides valid and reliable measures of performance of WHS management processes and their limitations
- organisational WHS policies, procedures, processes and systems, including:
 - accessing, collecting, analysing and recording WHS information and data
 - storing, retrieving and retaining WHS information and data
 - external reporting requirements
- security, privacy and confidentiality requirements relating to accessing, collecting and storing WHS information and data
- requirements for reporting under WHS and other relevant legislation, including obligations for notification and reporting of incidents
- methods for providing evidence of compliance with WHS laws
- tools and techniques for:
 - collecting accurate, current and relevant WHS information and data
 - reviewing effectiveness of WHSIS
- systems for accessing, storing and retrieving WHS information and data
- communication strategies for facilitating engagement of system users
- user training arrangements.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- reports and sample software for WHS information and data collation and analysis
- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS518 Manage WHS hazards associated with maintenance and use of plant

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to effectively manage work health and safety (WHS) hazards and to comply with WHS laws, as they apply to the management or control of items of plant being maintained and used in a workplace. It requires strong communication skills and systematic approaches to identify and resolve WHS issues associated with plant.

The unit applies to those who provide guidance to others in the workplace in managing WHS hazards associated with plant. The unit does not apply to the design, manufacture, supply, installation, construction or commissioning of plant or issuing of licences associated with plant.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify WHS hazards associated with plant | 1.1 Access sources of WHS information, data and advice relating to items of workplace plant 1.2 Inspect items of plant and identify how they are to be used, according to organisational policies and procedures 1.3 Determine WHS hazards arising from plant use, condition, suitability, location and potential abnormal situations 1.4 Consult with others to confirm hazard identification 1.5 Record and report identified hazards according to organisational policies and procedures |
| 2. Assess WHS risks associated with plant | 2.1 Access sources of information, data and advice to assist with assessing WHS risks associated with identified plant hazards 2.2 Consult with others to inform WHS risk assessment according to organisational policies and procedures 2.3 Record and report on WHS risk assessment according to WHS laws and organisational policies and procedures |
| 3. Control WHS risks associated with maintenance and use of plant | 3.1 Access sources of information, data and advice to inform development of risk controls for safe maintenance and use of plant 3.2 Develop risk controls to be implemented according to the hierarchy of control measures, WHS legislative requirements and organisational policies and procedures 3.3 Consult with, and report to, required internal and specialist personnel in relation to risk controls to be implemented 3.4 Communicate rights, obligations and duties of workplace personnel in relation to identified hazards and risk controls associated with plant 3.5 Monitor effectiveness of implemented risk controls 3.6 Record and report on implemented risk controls according to WHS legislative requirements and organisational policies and procedures |
| 4. Advise on registration, | 4.1 Identify types of plant requiring registration and tasks |

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| licensing and certification issues associated with plant | <p>requiring operator licensing and/or certification according to WHS legislative requirements</p> <p>4.2 Document registration, licensing and certification requirements according to organisational procedures</p> <p>4.3 Monitor and report compliance with WHS regulatory requirements for registration, licensing and certification according to organisational procedures</p> <p>4.4 Communicate registration, licensing and certification requirements to required personnel</p> |
| 5. Manage training requirements for plant maintenance and operation | <p>5.1 Identify WHS-related training needs associated with plant items, and applicable registration, licensing and certification requirements</p> <p>5.2 Identify skill gaps of those maintaining and using plant, and determine and communicate their associated training needs</p> <p>5.3 Ensure training is undertaken and completed prior to commencing work with new plant and/or new system of work</p> <p>5.4 Maintain training records according to WHS requirements and organisational policies and procedures</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Description |
|---------|---|
| Reading | <ul style="list-style-type: none"> Analyses a wide range of WHS-related technical and non-technical information and data to determine actions, and adheres to requirements associated with plant maintenance and use |
| Writing | <ul style="list-style-type: none"> Uses appropriate formats, vocabulary and grammatical structures to record, report and present information associated with plant |
| Oral | <ul style="list-style-type: none"> Explains information clearly and |

| Skill | Description |
|----------------------------|--|
| Communication | involves others in collaborative discussions using listening and questioning techniques |
| Numeracy | <ul style="list-style-type: none"> Collates, interprets and compares mathematical and statistical information |
| Navigate the world of work | <ul style="list-style-type: none"> Follows WHS policies, procedures and legislative requirements, and identifies organisational implications of new WHS laws Modifies or develops systems of work to comply with legislative and organisational requirements |
| Interact with others | <ul style="list-style-type: none"> Establishes and uses appropriate conventions and protocols when communicating with others regarding management of WHS hazards associated with plant |
| Get the work done | <ul style="list-style-type: none"> Develops and applies organisational processes to aid compliance with WHS legislative requirements Sequences and schedules own activities, monitors implementation, records progress and manages relevant communication Systematically gathers and analyses information and evaluates options in order to make informed decisions Evaluates effectiveness of systems and processes to inform decisions on how to implement risk control improvements Fully utilises features of digital tools to complete tasks |

Unit Mapping Information

No equivalent unit.

Supersedes and is equivalent to BSBWHS508 Manage WHS hazards associated with plant.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS518 Manage WHS hazards associated with maintenance and use of plant

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- develop and implement work health and safety (WHS) related risk controls for at least two different items of plant according to the hierarchy of control measures, WHS legislative requirements and organisational policies and procedures
- identify and manage licensing and training requirements associated with at least two different items of plant.

During the above, the candidate must:

- manage effective identification of hazards
- communicate, according to established protocols, to:
 - advise relevant personnel of their rights, obligations, and duties in relation to hazards and risk controls associated with plant
 - seek specialist advice as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- key features of WHS Acts, regulations, codes of practice and other instruments issued by WHS regulators relating to managing WHS hazards associated with plant, including role and duty of persons conducting a business or undertaking (PCBUs)
- organisational WHS policies, procedures, processes and systems relating to hazard management process, including:
 - identifying and accessing internal and external sources of WHS information and data
 - inspecting plant and its use
 - consulting with internal and external personnel

- recording and reporting identified WHS hazards
- recording and reporting risk assessment outcomes and risk controls
- developing risk controls and monitoring the effectiveness of their implementation
- documenting registration, licensing and certification requirements
- monitoring and reporting compliance with regulatory requirements for registration, licensing and certification
- basic principles of incident causation and injury processes relating to plant
- differences between a hazard and a risk
- factors that impact on risk
- hierarchy of control measures and its use in choosing between different risk controls
- strategies for identifying risk controls and monitoring their effectiveness, including:
 - workplace inspections
 - robotic and technological processes, and their potential risks and limitations
 - review of adequacy of plant operating procedures
- high-risk work licences required for specific plant
- methods for providing evidence of compliance with WHS laws
- plant-specific knowledge:
 - basic physics of fluids under pressure and pressure vessels, and behaviour of pressurised fluid when pressure is released
 - hazards associated with plant
 - systems of work associated with plant
 - industry practices related to permit to work, and isolation and tag-out systems
 - registration requirements of plant, licensing and certification competencies
- risk controls relating to operation of plant, including:
 - strategies for guarding moving parts in machinery
 - access and egress
 - dangerous parts
 - emergency stops and warning devices
- WHS-related training requirements for plant operators relating to:
 - items of new plant
 - new or changed systems of work associated with plant.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- sources of information, data and advice in relation to plant hazards

- workplace equipment and resources, including manufacturer manuals, specifications, and operational information and data
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS519 Lead the development and use of WHS risk management tools

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to lead the development and use of work health and safety (WHS) risk management tools.

The unit applies to those responsible for managing hazards in the workplace whose role requires them to provide leadership in WHS risk management.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.
3. WHS risk management tools are used in the four steps identified by the Safe Work Australia model code of practice, *How to manage work health and safety risks* – identify hazards, assess risks, control risks and review control measures.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Select and develop WHS risk management tools | 1.1 Apply knowledge of risk management tools to address requirements of WHS laws and workplace 1.2 Consult with required personnel about selecting suitable risk management tools 1.3 Modify existing risk management tools and/or develop new ones to meet identified requirements 1.4 Determine risk management tools to be used in workplace |
| 2. Lead the use of WHS risk management tools | 2.1 Consult and liaise with required personnel about logistical arrangements required in relation to risk management tools 2.2 Facilitate required logistical arrangements for use of risk management tools in collaboration with required personnel 2.3 Develop and conduct required training for personnel who will use risk management tools 2.4 Use risk management tools according to organisational policies and procedures 2.5 Provide support to required personnel to use risk management tools according to organisational requirements |
| 3. Communicate outcomes of use of WHS risk management tools | 3.1 Collect information about outcomes of risk management tool use 3.2 Collate and analyse collected information 3.3 Document analysis according to organisational policies and procedures 3.4 Communicate documented results, findings and outcomes to required personnel according to organisational protocols and procedures |
| 4. Review use of WHS risk management tools | 4.1 Review usefulness and usability of risk management tools according to organisational requirements 4.2 Modify or replace risk management tools based on review outcomes according to organisational requirements 4.3 Modify consultation, liaison and logistical arrangements in relation to tools based on review outcomes according to organisational requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none">Interprets and critically analyses texts to identify suitable WHS risk management tools |
| Writing | <ul style="list-style-type: none">Develops and modifies WHS risk management tools and associated logistical arrangementsCommunicates using layout, vocabulary, grammatical structure and conventions appropriate to tool and audience |
| Oral communication | <ul style="list-style-type: none">Presents information about WHS risk management tools, using structure and language appropriate to audienceAsks questions and actively listens to extract main ideas across a range of contexts as appropriate to WHS risk management tools |
| Navigate the world of work | <ul style="list-style-type: none">Identifies operational context in which WHS risk management tools are used and kept up to date |
| Interact with others | <ul style="list-style-type: none">Engages with others to support them in their use of WHS risk management tools |
| Get the work done | <ul style="list-style-type: none">Sequences and schedules activities, monitors implementation and manages relevant communicationUses analytical processes to decide on a course of action, establishes criteria for deciding between WHS risk management tools, and seeks input and advice from others before taking necessary actionUses technology and digital systems and tools effectively |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS509 Facilitate the development and use of risk management tools.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS519 Lead the development and use of WHS risk management tools

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- in consultation with others, select at least one work health and safety (WHS) risk management tool to be developed or modified that addresses WHS legislative and organisational requirements
- use above WHS risk management tool/s for intended purpose, including:
 - facilitating logistical arrangements to the point of completion
 - collating and analysing results and findings
 - communicating results, findings and outcomes
- facilitate the use of the above WHS risk management tool/s, including:
 - developing and conducting training for users
 - consulting about and facilitating logistical arrangements for use
 - supporting users
- review usefulness and usability of above WHS risk management tool/s and make changes based on review outcomes.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws and other instruments issued by WHS regulators relating to the performance evidence, and procedures for applying them
- factors to consider when selecting WHS risk management tools, including:
 - operational contexts, including specific physical and psychosocial hazards
 - WHS organisational information, and valid and reliable methods for collecting it
 - tool application and use
 - limitations

- models for incident causation
- usefulness and usability
- organisational policies and procedures relating to WHS risk management tools, including those for:
 - modifying and developing tools
 - communicating information
 - providing support on tools and their use
 - reviewing tools
- key features of good-practice WHS risk management tools
- techniques, tools and processes for identifying WHS hazards:
 - hazard and risk checklists
 - hazard hunts
 - job safety analyses
 - manifests and registers, including those for dangerous goods, hazardous chemicals and plant
 - surveys using questionnaires, interviews and other techniques
 - safe work method statements
 - workplace inspections and walk-throughs
- key aspects of logistical arrangements, including:
 - communications
 - availability of personnel
 - ensuring required work areas and processes are accessible and in operation
 - resources required to implement tool
 - timetabling
 - transport requirements.
 -

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- sources of information, data and advice in relation to WHS risk management tools
- WHS risk management tools
- workplace equipment and resources, including manufacturer manuals, specifications, and operational information and data
- engagement in an actual workplace
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS520 Manage implementation of emergency procedures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to implement initial response procedures for emergencies. Its focus is on the implementation of procedures already developed for short-term emergency responses. It assumes that expert advice will be available in identifying potential emergencies and in formulating response plans.

The unit applies to those with supervisory responsibilities for managing work health and safety (WHS) in the workplace who contribute to the implementation of procedures for responding to emergencies. These people work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify potential emergencies | 1.1 Apply knowledge of WHS hazards and relevant standards to identify possible causes of potential emergencies 1.2 Seek input from stakeholders in identifying potential emergencies 1.3 Identify and liaise with appropriate specialist advisers and emergency services and/or specialist response teams to identify possible causes of potential emergencies 1.4 Develop a risk register to identify potential emergencies and their possible causes |
| 2. Identify options for initial response | 2.1 Categorise major types of potential emergencies 2.2 Identify actions required to contain or limit potential emergencies 2.3 Identify actions required to limit impact of potential emergencies on personnel, property and the environment 2.4 Identify requirements for liaison with emergency services and/or specialist response teams 2.5 Prioritise initial response actions to be taken during emergencies |
| 3. Plan initial response procedures | 3.1 Identify resources available and required for initial response 3.2 Ensure that emergency equipment is checked for serviceability, accessibility, cleanliness and correct location 3.3 Document actions required for a range of major types of emergency, taking account of standards, current industry practice, specialist advice and input by emergency services and/or specialist response teams 3.4 Identify training needs and appropriate providers |
| 4. Implement initial response procedures | 4.1 Document and display actions for initial response 4.2 Outline own role in initial response 4.3 Follow required procedures according to WHS laws, and organisational policies and procedures |
| 5. Review initial response procedures | 5.1 Monitor initial response for effectiveness, efficiency and timeliness in consultation with stakeholders and, specialist advisers and agencies as required 5.2 Document results of response monitoring and promptly report to appropriate persons |

| ELEMENTS | PERFORMANCE CRITERIA |
|-------------------------------------|---|
| | 5.3 Identify areas for organisational and personal improvement and make recommendations based on analysis of response |
| 6. Manage post-emergency activities | 6.1 Identify and support other personnel involved in second response phase 6.2 Facilitate debriefing processes |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets and critically analyses texts when planning emergency response procedures Applies appropriate strategies to construct meaning from texts to assist in planning emergency response procedures |
| Writing | <ul style="list-style-type: none"> Develops risk registers, reports and associated documentation according to organisational requirements, using appropriate vocabulary, grammatical structure and conventions |
| Oral communication | <ul style="list-style-type: none"> Asks questions and actively listens to gather information about potential emergency situations Provides information during or after emergency response situations using structure and language appropriate to audience and context |
| Navigate the world of work | <ul style="list-style-type: none"> Contributes to broader goals in emergency response contexts Identifies legal rights and responsibilities of self and others in relation to emergency response contexts Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications in emergency response contexts |
| Interact with others | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction Takes a leadership role in supporting, consulting and liaising in emergency response contexts |
| Get the work done | <ul style="list-style-type: none"> Formulates plans and monitors actions against stated goals, adjusting plans and resources to cope with contingencies Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates several choices to determine appropriate actions and responses Applies problem-solving processes when identifying actions required |

| Skill | Description |
|-------|---|
| | <p>in emergencies and associated training needs, resolving issues in manageable parts, and identifying and evaluating options for action</p> <ul style="list-style-type: none">• Reflects on response outcomes and feedback from others in order to identify general principles and concepts that may be applicable in new emergency situations• Identifies the potential of new approaches to enhance work practices and outcomes |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS510 Contribute to implementing emergency procedures.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS520 Manage implementation of emergency procedures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- manage the planning, implementation and review of initial response procedures for at least two different emergencies.

During the above, the candidate must:

- identify and prioritise causes and options for initial response to contain or limit potential emergencies and their impact
- liaise with specialist advisers, emergency services and/or specialist response teams as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory work health and safety (WHS) legislation and how it applies to managing the implementation of initial response procedures
- organisational and workplace WHS policies and procedures relating to initial response, including:
 - identifying and reporting emergencies
 - categorising major types of potential emergencies
 - essential communication and actions in an emergency
 - reporting on response to emergency
- internal and external sources of WHS information and data, and procedures for accessing them
- organisational structure, roles and responsibilities of WHS personnel managing the implementation of initial response procedures

- workplace emergency response equipment, including:
 - emergency alerting systems
 - emergency protection systems
 - smoke alarms, fire alarms and fire extinguishers
 - required safety wear
 - security systems
- nature of work, work site and hazards that may result in an emergency situation
- hazards arising and precautions to be taken during emergency response
- information needs of emergency response personnel during reporting, arrival and response to an emergency
- principles and priorities of fire protection and emergency response applicable to performance evidence
- accepted industry practice when responding to workplace emergencies.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS521 Ensure a safe workplace for a work area

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to establish, maintain and evaluate an organisation's work health and safety (WHS) policies, procedures and programs in a work area to ensure a safe workplace, according to WHS legislative requirements. It takes a systems approach and addresses compliance with relevant legislative requirements.

The unit applies to those working in a range of contexts who have, or are likely to have, responsibility for WHS as part of their broader management role. It is relevant for people with obligations under WHS laws, for example persons conducting a business or undertaking (PCBUs) or officers, as defined by WHS laws.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish a WHS management system in a work area | <p>1.1 Locate, adapt, adopt and communicate WHS policies that define the organisation's commitment to complying with WHS laws</p> <p>1.2 Identify duty holders and define WHS responsibilities for all workplace personnel in the work area according to WHS laws, policies, procedures and programs</p> <p>1.3 Identify and approve financial and human resources required by the WHS management system (WHSMS) according to organisational procedures</p> |
| 2. Establish and maintain effective and compliant consultative arrangements for managing WHS in a work area | <p>2.1 Work with required personnel to set up and maintain consultative arrangements according to required WHS laws</p> <p>2.2 Resolve issues raised through participation and consultation arrangements according to required WHS laws and organisational protocols</p> <p>2.3 Provide information about consultation and participation outcomes to required personnel according to organisational policies and procedures</p> |
| 3. Establish and maintain procedures for effectively identifying hazards, and assessing and controlling risks in work area | <p>3.1 Develop procedures for ongoing hazard identification, and assessment and control of associated risks</p> <p>3.2 Include hazard identification at the planning, design and evaluation stages of any workplace change to ensure that new hazards are not created by proposed changes and existing hazards are controlled</p> <p>3.3 Develop and maintain procedures for selecting and implementing risk controls according to the hierarchy of control measures and WHS legislative requirements</p> <p>3.4 Identify inadequacies in existing risk controls according to the hierarchy of control measures and WHS legislative requirements, and promptly provide resources to enable implementation of new measures</p> <p>3.5 Identify requirements for expert WHS advice, and request this advice as required, according to organisational procedures</p> |
| 4. Evaluate and maintain a work area WHS management system | 4.1 Develop and provide a WHS induction and training program for required personnel in a work area as part of |

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|--|
| (WHSMS) | <p>organisation's training program</p> <p>4.2 Use a system for WHS recordkeeping to allow identification of patterns of occupational injury and disease in the organisation, and to maintain a record of WHS decisions made, including reasons for decisions</p> <p>4.3 Measure and evaluate the WHSMS according to organisation's quality systems framework</p> <p>4.4 Develop and implement improvements to WHSMS to achieve organisational WHS objectives according to organisational procedures</p> <p>4.5 Ensure compliance with WHS legislative framework to achieve, as a minimum, WHS legal requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Organises, evaluates and critiques ideas and information from WHS laws, policies, procedures and programs |
| Writing | <ul style="list-style-type: none"> Produces WHS policies, procedures and programs using appropriate vocabulary, grammatical structure and conventions Records WHS decisions according to organisational requirements |
| Oral communication | <ul style="list-style-type: none"> Presents and seeks information from others using structure and language suitable for the audience Provides information about WHS policies and procedures and on resolution of WHS issues, varying the level of technical vocabulary to suit the audience |
| Numeracy | <ul style="list-style-type: none"> Selects from, and applies, an expanding range of mathematical and problem-solving strategies in identifying financial and human resources required to support WHS requirements |
| Navigate the world of work | <ul style="list-style-type: none"> Monitors adherence to legal and regulatory rights and responsibilities for self and others in relation to WHS Develops, implements and reviews WHS-related policies, procedures and processes according to legislative and organisational requirements |
| Interact with others | <ul style="list-style-type: none"> Plays a lead role in situations requiring effective collaboration, demonstrating the ability to guide discussions and negotiate |

| Skill | Description |
|-------------------|---|
| | agreeable outcomes <ul style="list-style-type: none">Provides feedback to others in forms they can understand and use |
| Get the work done | <ul style="list-style-type: none">Develops plans or processes to manage relatively complex WHS management tasks, with an awareness of how they contribute to operational and strategic goalsUses systematic and analytical processes, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteriaConsiders whether, and how, others should be involved, using consultative or collaborative processes as an integral part of the decision-making processUses digital systems and tools to enter, store and retrieve relevant information |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS501 Ensure a safe workplace.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS521 Ensure a safe workplace for a work area

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- establish, implement, maintain and evaluate one work health and safety management system (WHSMS) for a work area of an organisation that complies with WHS laws, and organisational policies and procedures.

During the above, the candidate must:

- establish, implement, maintain and evaluate effective and compliant consultative arrangements for managing WHS, including:
 - identifying duty holders
 - identifying and approving required resources
 - developing and implementing a training program
- establish, implement, maintain and evaluate procedures for effectively identifying hazards, and assessing and controlling risks using the hierarchy of control measures.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- details of relevant WHS laws relating to ensuring a safe workplace
- WHS organisational policies, procedures, programs and practices required for the performance evidence
- hazard identification and risk-management processes
- key principles, uses and components of the hierarchy of control measures and procedures for applying it in the workplace
- organisational and WHS legislative reporting requirements.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational WHS policies and procedures required to demonstrate the performance evidence
- WHS laws required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS522 Manage WHS consultation and participation processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to manage the identification, review, development, implementation and evaluation of consultation and participation processes as an integral part of managing work health and safety (WHS).

The unit applies to those responsible for facilitating consultation about and participation in WHS management and decision-making across the organisation. These people work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify requirements for WHS consultation and participation | <p>1.1 Review WHS laws to identify duty holders and legal requirements for WHS consultation and participation processes</p> <p>1.2 Review organisational policies, procedures, processes and systems to identify requirements and opportunities for WHS consultation and participation</p> <p>1.3 Consult with required personnel according to organisational procedures to identify specific requirements for WHS consultation and participation</p> |
| 2. Review existing WHS consultation and participation processes | <p>2.1 Review effectiveness of existing WHS consultation and participation processes, in consultation with required personnel</p> <p>2.2 Identify inconsistencies between existing processes and identified requirements for WHS consultation and participation processes</p> <p>2.3 Consult with required personnel to identify specific areas for improvement in WHS consultation and participation processes</p> |
| 3. Develop WHS consultation and participation processes | <p>3.1 Identify factors that may impact on design of WHS consultation and participation processes</p> <p>3.2 Design new or modify existing processes to achieve required improvements, in consultation with required personnel</p> <p>3.3 Ensure improvements integrate with existing WHS and other systems and are appropriate to organisation</p> <p>3.4 Plan how improvements will be implemented and identify resourcing requirements, roles and responsibilities, and training needs required for implementation</p> <p>3.5 Develop action plans with allocated responsibilities and timelines</p> <p>3.6 Determine priorities for implementation, in consultation with required personnel</p> |
| 4. Facilitate implementation of WHS consultation and participation arrangements | <p>4.1 Clarify individual roles and responsibilities in WHS consultation and participation arrangements</p> <p>4.2 Provide advice and support to required personnel</p> |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| | during implementation according to organisational procedures 4.3 Monitor and facilitate implementation, in consultation with required personnel 4.4 Recommend and facilitate changes to action plan as required according to organisational procedures |
| 5. Monitor and evaluate WHS consultation and participation processes | 5.1 Develop evaluation protocol, in consultation with required personnel 5.2 Develop and implement plan for collecting information 5.3 Analyse and evaluate information according to organisational policies and procedures 5.4 Make recommendations for improvement based on evaluation 5.5 Document action plan to address recommended improvements according to organisational policies and procedures 5.6 Communicate outcomes of monitoring and evaluation to required personnel according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Organises, analyses and critiques ideas and information from a range of legal and organisational texts to identify WHS duty holders, and consultation and participation requirements |
| Writing | <ul style="list-style-type: none">Employs broad vocabulary and uses grammatical structure and conventions appropriate to text in writing reports, plans and protocolsUses appropriate vocabulary and language to seek information from others |
| Oral communication | <ul style="list-style-type: none">Presents ideas and information choosing appropriate vocabulary for purpose and audienceUses questioning and active listening to seek opinions or information and to clarify understanding |

| Skill | Description |
|----------------------------|--|
| Numeracy | <ul style="list-style-type: none">• Uses required numeracy and problem-solving strategies and techniques in designing and using information collection and analysis processes |
| Navigate the world of work | <ul style="list-style-type: none">• Adheres to legal and regulatory rights and responsibilities and monitors others' adherence in relation to WHS consultation and participation processes• Interprets operational policies and procedures to ensure that consultation and participation processes align with other work practices |
| Interact with others | <ul style="list-style-type: none">• Plays a lead role in situations requiring effective collaboration• Provides feedback to others in forms they can understand and use |
| Get the work done | <ul style="list-style-type: none">• Manages tasks with an awareness of how they contribute to operational and strategic goals• Uses systematic and analytical processes: sets goals, gathers relevant information, and identifies and evaluates options against agreed criteria• Considers whether, and how, others should be involved, using consultative or collaborative processes as an integral part of the decision-making process• Uses analytical processes to decide on a course of action, establishes criteria for deciding between options, and seeks input and advice from others before taking necessary action• Uses digital systems and tools for data collection and analysis and communication and reporting |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS502 Manage effective WHS consultation and participation processes.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS522 Manage WHS consultation and participation processes

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- manage effective work health and safety (WHS) consultation and participation processes in consultation with others for at least one WHS consultation and participation issue, including:
 - developing an action plan with positive performance indicators
 - identifying gaps and areas for improving processes
 - implementing, monitoring and reviewing processes.

During the above, the candidate must:

- implement legal and organisational requirements
- provide advice and support to others during implementation of process and recommend changes as required.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- internal and external sources of WHS information and data, and procedures for accessing them
- communication networks, processes and formats required for consultation and participation processes
- commonwealth and state/territory WHS laws and guidance material, in particular the parts relating to:
 - duties of persons conducting a business or undertaking (PCBUs), officers, workers and inspectors
 - duty holders

- consultation, participation and representation
- discriminatory, coercive and misleading conduct
- workplace entry by WHS permit holders
- formal and informal communication and consultation processes, and key personnel related to communication
- impact of characteristics and composition of the workforce on WHS risk and WHS management, including:
 - communication skills
 - cultural background and diversity
 - gender
 - principles of coordination and cooperation
 - labour market changes
 - levels of language, literacy and numeracy skills in the workforce
 - structure and organisation of the workforce, including part-time, casual and contract workers, shift rosters and geographical location
 - workers with specific needs and limitations
- key roles and responsibilities of personnel, including agents of change in workplace management structure
- key features of organisational culture as it impacts on work team and consultation and participation processes
- relevant organisational WHS policies, procedures, processes and systems
- key features of the WHSMS and action plans as they apply to consultation and participation processes
- key design principles for planning and implementing consultation and participation processes
- key techniques for supporting and promoting consultation and participation processes
- key tools and techniques for evaluating plans and processes for consultation and participation.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- reports from other parties consulted about design, implementation, management and review processes
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to implement a system of work for managing the use, handling, processing, storage, transportation and disposal of hazardous chemicals in the workplace; and to verify and validate the effectiveness of that system and the control methods in place against safety data sheet (SDS) requirements. The unit includes the application of the hierarchy of control measures, and applicable legislative requirements and licensing conditions imposed on the workplace in managing these hazardous chemicals.

The unit applies to those accountable for ensuring that a system of work is in place for managing hazardous chemicals in a specified work area. The system of work to be implemented protects all those potentially at risk in the workplace from exposure to hazardous chemicals, including internal and external personnel.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to implement safe system of work to manage hazardous chemicals in work area | <p>1.1 Identify hazardous chemicals in work area according to legislative requirements and workplace procedures</p> <p>1.2 Check that hazardous chemicals register and SDSs contain required information about identified chemicals</p> <p>1.3 Consult with required personnel to address any identified deficiencies and update hazardous chemicals register and safe work method statements (SWMSs) according to legislative requirements</p> <p>1.4 Assess risks associated with identified hazardous chemicals and their use, handling, processing, storage, transportation and disposal</p> |
| 2. Implement and monitor system of work for managing hazardous chemicals in work area | <p>2.1 Establish suitable control methods and incident action plans within work area, consulting with required personnel and seeking external specialist advice as required</p> <p>2.2 Communicate established control methods and incident action plans to required personnel according to legislative requirements and workplace procedures</p> <p>2.3 Monitor work area activities, processes and procedures for compliance with established control methods, and SDSs and SWMSs requirements according to workplace procedures</p> <p>2.4 Adjust system components in response to identified deficiencies, within scope of own role, or escalate with suitable personnel, according to workplace procedures</p> |
| 3. Verify and validate system effectiveness in managing hazardous chemicals in work area | <p>3.1 Monitor work area safety records and information against expected benchmarks according to workplace procedures</p> <p>3.2 Seek feedback from suitable personnel to inform system verification and validation process</p> <p>3.3 Document outcomes of, and recommendations arising from, system verification and validation process according to legislative requirements and workplace procedures</p> <p>3.4 Report outcomes of system verification and validation process to required personnel</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none">• Interprets and critically analyses texts when managing hazardous chemicals• Applies appropriate strategies to construct meaning from texts to assist in handling and storing hazardous chemicals |
| Writing | <ul style="list-style-type: none">• Updates hazardous chemicals registers, SWMS, reports and associated documentation according to organisational requirements• Uses vocabulary, grammatical structure and conventions appropriate to text when developing documentation |
| Oral communication | <ul style="list-style-type: none">• Asks questions and actively listens to gather information about potential risk situations• Provides information before, during and after hazardous chemicals situations using structure and language appropriate to the audience |
| Navigate the world of work | <ul style="list-style-type: none">• Contributes to broader goals in hazardous chemicals exposure contexts• Identifies own legal rights and responsibilities as well as general legal principles in relation to hazardous chemicals• Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications in hazardous chemical contexts |
| Interact with others | <ul style="list-style-type: none">• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction• Takes a leadership role, as required, in supporting, consulting and liaising on hazardous chemicals incidents |
| Get the work done | <ul style="list-style-type: none">• Uses decision-making processes: sets and clarifies goals, gathers information, and identifies and evaluates several choices to determine appropriate storage and handling of hazardous chemicals |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- implement a system of work for managing hazardous chemicals in one work area
- verify and validate effectiveness of the implemented system of work.

During the above, the candidate must:

- interpret requirements in safety data sheets (SDSs) and safe work method statements (SWMSs) relating to the hazardous chemicals identified in work area
- select applicable higher-level controls.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- safe system of work for managing hazardous chemicals:
 - SDS and SWMS requirements relating to hazardous chemical use
 - SDS requirements relating to hazardous chemical storage, transport and disposal
 - control methods, including personal protective equipment (PPE) requirements
- workplace procedures for:
 - identifying hazards and assessing risk associated with hazardous chemicals
 - selecting suitable control methods and incident action plans
 - monitoring work area activities for compliance with selected controls and plans
- key principles of the hierarchy of control measures in eliminating or minimising exposure to hazards from chemicals
- standards, legislative requirements and licensing conditions applicable to work area for managing hazardous chemicals, including:

- Act/s pertaining to dangerous goods in the state or territory of operation, including transport and storage requirements
- globally harmonised system of classification and labelling of chemicals (GHS): chemical classification and labelling requirements and protocols
- environmental effects of hazardous chemicals in work area and disposal considerations set out in applicable SDSs
- work area safety records and information to verify and validate effectiveness of system of work:
 - health records
 - first aid records
 - workplace exposure monitoring data.
 -

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace equipment and resources
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS603 Implement WHS risk management

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0 |

Application

This unit describes the skills and knowledge required to implement work health and safety (WHS) risk management. It addresses the establishment, implementation, review and improvement of WHS risk management frameworks and processes.

It applies to people who apply advanced practical knowledge to coordinate, facilitate and maintain the WHS program within an organisation.

NOTE: The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Manage effective WHS risk management consultation and | 1.1 Identify individuals and parties who need to participate in, contribute to, and be consulted during each stage of WHS risk management |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| participation processes | <p>1.2 Apply knowledge of effective WHS consultation and participation processes to review existing consultation and participation processes</p> <p>1.3 Modify existing consultation and participation processes and/or implement new processes to ensure effective consultation and participation during all stages of WHS risk management</p> <p>1.4 Use consultation and participation processes to ensure WHS risk management processes are appropriate to the organisation and the WHS risks</p> |
| 2 Arrange for necessary resources during WHS risk management | <p>2.1 Identify necessary resources required for each stage of WHS risk management</p> <p>2.2 Budget for necessary resources</p> <p>2.3 Procure resources and ensure availability as required</p> |
| 3 Review and improve existing WHS risk management processes | <p>3.1 Access existing workplace WHS information and data</p> <p>3.2 Identify existing WHS risk management processes</p> <p>3.3 Consult with individuals and parties on WHS risk management processes</p> <p>3.4 Review processes with regard to effectiveness of current risk controls, lessons learnt from events, changes in the internal and external contexts, emerging risks and performance against indicators</p> <p>3.5 Use results of review to develop and implement effective WHS risk management</p> |
| 4 Establish the WHS risk management framework | <p>4.1 Identify sources of information and data</p> <p>4.2 Obtain information and data to determine the purposes, objectives, principles and framework of a systematic approach to WHS risk management</p> |
| 5 Establish the context for WHS risk management | <p>5.1 Apply knowledge of WHS legislation to identify duty holders and legislative requirements for WHS risk management</p> <p>5.2 Identify individuals and parties impacting on WHS risk management</p> <p>5.3 Identify factors that will impact on WHS risk management</p> <p>5.4 Establish context of the WHS risk management process</p> <p>5.5 Define risk criteria</p> |
| 6 Assess risks | <p>6.1 Apply knowledge of WHS hazards and risks to undertake hazard identification</p> <p>6.2 Apply knowledge of WHS legislation, WHS risk assessment and</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | workplace WHS information and data to undertake risk analysis and evaluation |
| 7 Control risks | 7.1 Apply knowledge of outcomes of risk assessment, WHS risk controls, and WHS legislation to select risk treatment options 7.2 Prepare and implement risk control measures |
| 8 Monitor, review and record the WHS risk management process | 8.1 Apply knowledge of the organisation's WHS management system (WHMS) to monitor and review WHS risk management 8.2 Apply knowledge of the organisation's WHS information system (WHIS) to record the WHS risk management process |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|--|--|
| Reading | 1.1, 1.2, 3.1, 3.2, 3.4, 4.1, 4.2 | <ul style="list-style-type: none"> Interprets and critically analyses complex texts to identify parties, processes, legislative requirements and other relevant information |
| Writing | 1.3, 2.1, 2.2, 2.3, 3.5, 5.5, 6.2, 8.2 | <ul style="list-style-type: none"> Develops and documents information related to risk management processes matching style of writing to purpose and audience Uses appropriate vocabulary, grammatical structure and organisational conventions to produce a range of documents |
| Oral communication | 1.4, 3.3 | <ul style="list-style-type: none"> Presents information using language appropriate to the audience Uses questioning and active listening to seek information and encourage participation |
| Numeracy | 2.2, 3.4, 5.5, 6.2, 8.1, 8.2 | <ul style="list-style-type: none"> Analyses and synthesises embedded mathematical information when using workplace data in risk analysis and evaluation Uses formal and informal oral and written mathematical language and representation to communicate about risk management processes, analysis, evaluation and monitoring |
| Navigate the | 1.1, 5.1, 5.2 | <ul style="list-style-type: none"> Understands own legal rights and responsibilities and is |

| | | |
|----------------------|--|--|
| world of work | | <p>extending understanding of general legal principles applicable across WHS risk management contexts</p> <ul style="list-style-type: none"> Keeps up to date on changes to legislation or regulations relevant to own rights and responsibilities and considers implications of these when negotiating, planning and undertaking WHS risk management work |
| Interact with others | 1.4, 3.3 | <ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion when consulting on risk management processes |
| Get the work done | 1.3, 2.1, 2.2, 2.3, 3.4, 3.5, 5.3, 5.4, 6.1, 6.2, 7.1, 7.2, 8.1, 8.2 | <ul style="list-style-type: none"> Uses logical planning processes, and an increasingly intuitive understanding of context, to identify relevant information and risks, and to identify and evaluate alternative strategies and resources for risk management Uses systematic, analytical processes to select risk control options, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria Uses formal and informal processes to monitor implementation of solutions and reflect on outcomes of risk management processes Uses familiar digital systems and tools to access, organise, analyse and display information relevant to role |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| BSBWHS603 Implement WHS risk management | BSBWHS603A Implement WHS risk management | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS603 Implement WHS risk management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- manage effective work health and safety (WHS) risk management consultation and participation processes including:
 - identifying those who need to be involved
 - reviewing and improving existing processes
 - ensuring processes are appropriate to the organisation and WHS risks
- arrange for necessary resources during WHS risk management, including:
 - identifying and budgeting for requirements
 - procuring resources and ensuring availability
- review and improve existing WHS risk management processes, including:
 - using workplace information and data
 - consulting with individuals and parties
 - considering effectiveness, current risk controls, lessons learnt from events, changes in the internal and external contexts, emerging risks and performance against indicators
- develop a WHS risk management framework including:
 - using suitable sources of information and data to determine the purposes, objectives, principles and structure
- establish the context for WHS risk management including:
 - identifying duty holders, legislative requirements, impacting individuals, parties and factors
 - defining risk criteria
- assess risks including:
 - identifying hazards
 - undertaking risk analysis and evaluation
 - addressing requirements of WHS legislation, WHS risk assessment and workplace WHS information and data
- control risks including:

- selecting from control options according to outcomes of risk assessment, WHS hazards and risk controls, and WHS legislation
- preparing and implementing risk control measures
- monitor and review the WHS risk management process according to the organisation's WHS management system (WHSMS) requirements
- record the WHS risk management process according to the organisation's WHS information system (WHSIS) requirements.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain different definitions of hazard and risk and how they are used by different individuals and parties
- outline internal and external sources of WHS information and data and how to access them
- identify organisational WHS policies, procedures, processes and systems
- identify other functional areas that impact on the management of WHS
- describe the principles and practices of a systematic approach to managing WHS
- describe the principles of duty of care, including concepts of causation, foreseeability and preventability
- describe the principles of incident causation and injury processes
- list a range of risk analysis and assessment techniques and tools and their application and limitations
- outline relevant and applicable Australian legislation, standards and publications
- define risk as the effect of uncertainty on objectives
- define risk management as a duty of persons conducting businesses or undertakings (PCBUs) or officers under WHS legislation
- give examples of standard industry risk controls for a range of hazards
- outline techniques, tools and processes for identifying health and safety hazards and controlling risks:
 - hazard and risk checklists
 - hazard hunts
 - job safety analyses
 - manifests and registers, including for dangerous goods, hazardous chemicals and plant
 - safe work method statements
 - surveys using questionnaires, interviews and other survey techniques
 - workplace inspections and walk-throughs
- describe toxicology of hazardous chemicals and potential health effects in the workplace.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals carrying out work health and safety duties in the workplace and include access to:

- office equipment and resources
- relevant WHS legislation, standards and guidelines
- workplace policies and procedures
- reports from other parties consulted during the approach to WHS risk management
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS605 Develop, implement and maintain WHS management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to develop, implement and maintain a Work Health and Safety management system (WHSMS) or parts of a WHSMS.

It applies to individuals with organisational responsibilities and who have advanced practical knowledge required to coordinate, facilitate and maintain the WHS program in an organisation.

NOTE: The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Support and facilitate | 1.1 Determine the form, content, purposes and functions of a |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| the implementation of a WHSMS | <p>WHSMS appropriate to the organisation and its WHS risks</p> <p>1.2 Consult effectively with individuals and parties about the form, content, purposes and functions of a WHSMS and its implementation</p> <p>1.3 Facilitate agreement of individuals and parties to implementing a WHSMS</p> |
| 2 Develop WHS policy and commitment to a WHSMS | <p>2.1 Communicate to individuals and parties the WHS policy requirements and commitment requirements to implement a WHSMS</p> <p>2.2 Develop and implement an initial WHS review, as required, appropriate to own job role</p> <p>2.3 Develop WHS policy that meets organisational requirements and is appropriate to the organisation</p> <p>2.4 Facilitate and support the participation of, and consultation with, individuals and parties in developing and agreeing to WHS policy</p> <p>2.5 Document WHS policy and communicate it to individuals and parties</p> |
| 3 Develop a WHS plan | <p>3.1 Communicate to individuals and parties the requirements of a WHS plan</p> <p>3.2 Work with individuals and parties to produce a WHS plan appropriate to the organisation, that meets requirements</p> <p>3.3 Facilitate and support the participation of, and consultation with, individuals and parties in developing and agreeing to a WHS plan</p> |
| 4 Implement the WHS plan | <p>4.1 Communicate to individuals and parties the WHS plan implementation requirements, as appropriate to the organisation</p> <p>4.2 Facilitate and support the participation of, and consultation with, individuals and parties in implementing the WHS plan</p> <p>4.3 Work with individuals and parties to ensure policies, procedures, processes and systems support implementation of the WHS plan, according to own job role</p> |
| 5 Measure and evaluate WHS performance | <p>5.1 Communicate to individuals and parties the measurement and evaluation requirements of the WHS plan as appropriate to the organisation</p> <p>5.2 Facilitate and support the participation of, and consultation with, individuals and parties in measuring and evaluating WHS performance</p> <p>5.3 Assess policies, procedures, systems and processes in relation to</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|--|
| | their ability to support implementation of the WHS plan, according to own job role |
| 6 Review and improve the WHSMS | <p>6.1 Communicate to individuals and parties the review and improvement requirements of the WHSMS as appropriate to the organisation</p> <p>6.2 Facilitate and support the participation of, and consultation with, individuals and parties in reviewing and improving the WHSMS</p> <p>6.3 Document review outcomes and suggested WHSMS improvements, according to own job role and submit to management for consideration</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|--|---|
| Reading | 2.1, 2.3, 3.2, 5.1, 5.3, 6.1 | <ul style="list-style-type: none"> Interprets and critically analyses and applies appropriate strategies to construct meaning from complex texts, in relation to determining requirements of the WHSMS and WHS plan and policy |
| Writing | 2.1, 2.2, 2.3, 2.5, 3.1, 3.2, 4.1, 5.1, 6.1, 6.3 | <ul style="list-style-type: none"> Communicates complex relationships between ideas and information, matching style of writing to purpose and audience Displays knowledge of structure and layout employing broad vocabulary, grammatical structure and conventions appropriate to text |
| Oral communication | 2.1, 2.5, 3.1, 4.1, 5.1, 6.1 | <ul style="list-style-type: none"> Presents information or recommendations using language appropriate to the audience Uses questioning and active listening to seek clarification or confirm understanding |
| Numeracy | 5.1, 5.2 | <ul style="list-style-type: none"> Extracts and evaluates the mathematical information embedded in a range of tasks and texts in measuring and evaluating WHS performance Selects from, and applies, an expanding range of mathematical and problem solving strategies measuring and evaluating WHS performance |
| Navigate the | 2.3, 4.1 | <ul style="list-style-type: none"> Works independently and collectively within broad |

| | | |
|----------------------|---|---|
| world of work | | parameters, with a strong sense of responsibility and ownership of goals, plans, decisions and outcomes in development of WHS policy and plans |
| Interact with others | 1.2, 1.3, 2.4, 3.2, 3.3, 4.2, 4.3, 5.2, 6.2 | <ul style="list-style-type: none"> • Selects appropriate communication protocols and conventions in developing WHS policy and plans • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and influencing direction |
| Get the work done | 1.1, 2.2, 2.3, 2.4, 4.3, 5.2, 5.3, 6.3 | <ul style="list-style-type: none"> • Develops plans to manage relatively complex, non-routine tasks with an awareness of how they contribute to operational and strategic goals • Sequences and schedules complex activities, monitors implementation and manages relevant communication • Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria in relation to implementation of WHS plan • Uses analytical processes to decide on a course of action, establishing criteria for deciding between options, and seeking input and advice from others before taking action when necessary • Uses digital tools and systems to complete routine tasks, adapting some functions to improve personal efficiency in consultation, measurement and reporting |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBWHS605 Develop, implement and maintain WHS management systems | BSBWHS605A Develop, implement and maintain WHS management systems | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS605 Develop, implement and maintain WHS management systems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- support and facilitate the implementation of a work health and safety management system (WHSMS) including:
 - determining form, content, purposes and functions
 - consulting and gaining agreement
- develop work health and safety (WHS) policy and commitment to a WHSMS including:
 - communicating requirements
 - developing and implementing an initial review
 - meeting organisational requirements
 - facilitating and supporting consultation and participation
 - documenting and communicating the policy
- develop a WHS plan including:
 - communicating requirements
 - collaborating with others
 - facilitating and supporting consultation and participation
- implement a WHS plan including:
 - communicating requirements
 - facilitating and supporting consultation and participation
 - collaborating to ensure policies, procedures, processes and systems support WHS plan implementation
- measure and evaluate WHS performance including:
 - communicating requirements
 - facilitating and supporting consultation and participation
 - assessing policies, procedures, systems and processes for ability to support WHS plan implementation
- review and improve the WHSMS including:
 - communicating requirements

- facilitating and supporting consultation and participation
- documenting and reporting outcomes and suggested improvements.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- give examples of barriers to WHSMS implementation and strategies to overcome them
- describe the nature of information and data that provide valid and reliable measures of WHS performance and WHSMS, including positive performance indicators
- outline relevant Commonwealth and state or territory WHS Acts, regulations, codes of practice, standards, guidance material and other relevant publications
- outline requirements for recordkeeping that address WHS, privacy and other relevant legislation
- describe the structure and functions of a WHSMS
- summarise WHSMS certification and auditing standards, processes and requirements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced by individuals carrying out work health and safety duties in the workplace and include access to:

- office equipment and resources
- workplace WHS policies and procedures
- relevant Acts, regulations, codes of practice, standards and guidance materials.
- case studies and, where possible, real situations
- interaction with others

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS611 Develop and implement strategies that support work-related psychological health and safety

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to develop, implement and evaluate strategies that support work-related psychological health and safety and the control of work-related psychosocial hazards.

The unit applies to those who are in a position to apply the principles of work-related psychological health and safety risk management to develop appropriate strategies in their organisation. These people work in a range of WHS roles across all industries, and apply a substantial knowledge base and well-developed skills in a wide variety of WHS contexts.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia (SWA) for further information.
3. Safe Work Australia national guidance material refers to ‘psychosocial hazards or factors’ as ‘anything in the design or management of work that increases the risk of work-related stress’ and states that ‘work-related stress if prolonged and/or severe can cause both psychological and physical injury’. (SWA, *Work-related psychological health and safety: A systematic approach to meeting your duties*)

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop strategies that support work-related psychological health and safety | <p>1.1 Access and assess information and data relevant to creating and sustaining a psychologically healthy and safe workplace</p> <p>1.2 Review organisation's work-related psychosocial hazard register, associated risk assessments and identified risk controls</p> <p>1.3 Review complaints and incidents relating to work-related psychological health and safety, and associated psychosocial hazards</p> <p>1.4 Collaborate with others to develop strategies that maintain work-related psychological health and safety</p> <p>1.5 Document strategies according to organisational policies and procedures</p> |
| 2. Implement developed strategies that support work-related psychological health and safety | <p>2.1 Consult with required personnel to confirm their roles and responsibilities in relation to work-related psychological health and safety strategies</p> <p>2.2 Communicate work-related psychological health and safety strategies to required personnel</p> <p>2.3 Identify, disseminate and promote current information and data relating to implemented strategies</p> <p>2.4 Identify situations where specialist support is required and access support as needed</p> <p>2.5 Identify and address training needs for relevant stakeholders in identifying and managing risks to work-related psychological health and safety</p> |
| 3. Evaluate implemented strategies that support work-related psychological health and safety | <p>3.1 Establish processes and procedures for evaluating effectiveness of implemented work-related psychological health and safety strategies</p> <p>3.2 Seek feedback on implemented strategies from internal and, as required, external stakeholders</p> <p>3.3 Apply established evaluation processes and procedures</p> <p>3.4 Adjust strategy components in response to</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|--|
| | <p>evaluation outcomes and feedback received</p> <p>3.5 Document and communicate evaluation outcomes to required personnel according to organisational policies and procedures</p> <p>3.6 Document required enhancements to work-related psychological health and safety strategies arising from evaluation activities</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none">Identifies, interprets and analyses internal and external organisational texts relevant to work-related psychological health and safety requirements |
| Writing | <ul style="list-style-type: none">Communicates information about work-related psychological health and safety strategies, matching style of writing to purpose and audienceDrafts and develops required documents using appropriate vocabulary, grammatical structure and required conventions |
| Oral communication | <ul style="list-style-type: none">Presents information and ideas using vocabulary appropriate to audience and contextUses questioning and active listening to facilitate discussion, seek clarification, confirm understanding and seek feedbackCommunicates effectively, taking into consideration confidentiality and privacy of individuals |
| Numeracy | <ul style="list-style-type: none">Extracts and evaluates information and data from work-related psychological health and safety documentsUses oral and written mathematical language and graphical representation to communicate |
| Navigate the world of work | <ul style="list-style-type: none">Identifies own and others' legal rights and responsibilities relating to work-related psychological health and safety |
| Interact with others | <ul style="list-style-type: none">Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction and influencing direction |
| Get the work done | <ul style="list-style-type: none">Uses logical planning processes and understanding of context to plan work-related health and safety strategies |

| Skill | Description |
|-------|--|
| | <ul style="list-style-type: none">Sequences and schedules strategies, monitors their implementation and manages relevant communicationUses systematic and analytical processes in complex, non-routine situations: sets goals, gathers relevant information, and identifies and evaluates options against agreed criteriaIdentifies and anticipates problems and promotes appropriate resources and information, as required |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS611 Develop and implement strategies that support work-related psychological health and safety

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- develop and implement an organisational strategy to support work-related psychological health and safety
- evaluate effectiveness of the implemented strategy.

During the above, the candidate must:

- provide information to stakeholders about how to implement strategy and its associated procedures, using effective communication methods
- store records and information according to required privacy and confidentiality protocols.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory WHS laws and other relevant publications and guidelines relating to information and data, consultation, participation and work-related psychological health and safety, including:
- Safe Work Australia national guidance material *Work-related psychological health and safety: A systematic approach to meeting your duties*
- workplace factors that support or detract from work-related psychological health and safety
- features of strategies that support work-related psychological health and safety, including:
 - organisational systems and protocols for managing risk and providing information to relevant stakeholders about how to report work-related psychological health and safety concerns

- organisational systems and protocols for reporting and communicating intervention strategies
- procedures for reporting work-related psychological health and safety incidents and complaints
- procedures for supporting individuals and/or parties impacted by work-related psychological health and safety, including referring to appropriate resources
- methods for providing individuals with information and resources for managing own work-related psychological health and safety
- communication and consultation processes that promote work-related psychological health and safety
- resources required to support strategy implementation, including supportive technology
- organisational information, data and procedures that support implementation of work-related psychological health and safety strategies
- processes and procedures for evaluating effectiveness of implemented work-related psychological health and safety strategies
- internal and external sources of information and data about work-related psychosocial hazards and risks, and how to access them
- requirements for recordkeeping that use and store personal information according to privacy and confidentiality laws, and organisational policies, procedures, processes and systems
- work-related psychological health and safety duties of persons conducting a business or undertaking (PCBUs), officers and workers in relation to WHS risks.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- organisational documentation, information and data
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS612 Develop and implement a strategy to support a positive WHS culture

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to support the development of a strategy that embeds and promotes a just work health and safety (WHS) culture in a workplace. It includes facilitating workforce commitment to implementation and continuous improvement of the strategy, specifically from those in leadership positions. It also involves supporting organisational learning and development to strengthen the WHS culture in the workplace.

The unit applies to those responsible for directly supporting the development of workplace WHS culture.

NOTES

1. For the purposes of this unit of competency 'WHS culture' is defined as the shared values, attitudes, perceptions, competencies and patterns of behaviour that determine the commitment to, and the style and proficiency of, an organisation's health and safety management. Organisations with a just WHS culture are characterised by communications founded on mutual trust, by shared perceptions of the importance of safety, and by confidence in the efficacy of preventive measures.
2. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
3. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Assess current state of organisation's WHS culture | 1.1 Analyse current good practice theories, programs and policies about organisational WHS culture 1.2 Assess current organisational WHS-related compliance with identified good practice according to organisational policies and procedures 1.3 Document assessment outcomes according to organisational policies and procedures 1.4 Communicate desired WHS culture to required personnel |
| 2. Develop a strategy for creating a positive WHS culture | 2.1 Identify current and future organisational priorities and objectives for WHS culture 2.2 Determine resourcing required to implement a leadership-driven WHS culture 2.3 Develop policies and procedures to support identified priorities and objectives in consultation with required personnel 2.4 Develop key performance indicators (KPIs) for measuring WHS culture according to organisational policies and procedures 2.5 Document strategy for creating a positive WHS culture and communicate it to required personnel |
| 3. Implement developed strategy | 3.1 Establish roles and responsibilities relating to strategy implementation 3.2 Consult with required personnel to confirm their roles and responsibilities in relation to leadership and strategy implementation 3.3 Lead implementation of strategy for creating a positive WHS culture 3.4 Disseminate information and data that promote WHS culture to required personnel, according to organisational policies and procedures |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| | 3.5 Identify and address learning and development needs of workforce in adopting policies and procedures relating to WHS culture |
| 4. Monitor and evaluate strategy that supports WHS culture | <p>4.1 Establish processes and procedures for evaluating effectiveness of implemented strategy against established KPIs</p> <p>4.2 Seek feedback on implemented strategy from internal stakeholders, and external stakeholders as required</p> <p>4.3 Apply established evaluation processes and procedures</p> <p>4.4 Document evaluation outcomes and communicate them to required personnel according to organisational policies and procedures</p> <p>4.5 Adjust strategy components in response to evaluation outcomes and feedback received</p> <p>4.6 Establish and implement future review mechanisms to ensure continuous improvement of WHS culture that reflects desired culture</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets detailed information and theories relating to workplace WHS culture Interprets evaluation feedback |
| Writing | <ul style="list-style-type: none"> Uses clear and precise language to develop policies, procedures, strategies and objectives Develops strategy documentation in required format |
| Oral communication | <ul style="list-style-type: none"> Discusses and seeks information using appropriate structure and language for the particular audience Uses questioning and active listening to clarify or confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Interprets, analyses and presents data relating to strategy, including KPIs |
| Navigate the world of work | <ul style="list-style-type: none"> Takes a lead role in the support and development of a WHS strategy |

| Skill | Description |
|----------------------|---|
| Interact with others | <ul style="list-style-type: none">• Uses a variety of communication tools and techniques to promote objectives and awareness of a positive WHS culture• Uses inclusive and collaborative techniques to seek feedback and consults with a range of stakeholders• Works with leadership team to support their active involvement in strategy implementation |
| Get the work done | <ul style="list-style-type: none">• Plans, organises and implements activities required to achieve strategic priorities and outcomes, including consulting with others and sequencing initiatives to ensure strategy awareness |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS612 Develop and implement a strategy to support a positive WHS culture

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- develop and implement a strategy that embeds a positive work health and safety (WHS) culture in an organisation
- evaluate implemented strategy.

During the above, the candidate must:

- identify theories and information relevant to developing this strategy
- report effectiveness of WHS culture to required personnel
- communicate effectively with leadership team and other required personnel
- review implemented strategy and identify opportunities for its continuous improvement.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- legislative requirements relating to WHS culture, including privacy and confidentiality considerations of WHS records and information
- internal and external sources of information relating to theories, programs and policies about WHS culture
- organisational policies and procedures for:
 - assessing information about the current WHS culture in the organisation
 - developing key performance indicators relating to WHS culture
 - evaluating implementation of strategy and documenting outcomes of evaluation
 - using feedback tools and obtaining feedback
 - establishing and supporting workforce learning and development needs

- key features of a positive WHS culture
- key features of good-practice strategies for creating a positive WHS culture
- communication and consultation processes relating to creating a positive WHS culture and strategy implementation
- workforce factors impacting on WHS culture, including:
 - workforce language, literacy and cultural profiles
 - organisational behaviour
 - leadership attitudes and behaviour
- roles and responsibilities of personnel involved in developing, implementing and promoting a strategy for WHS culture.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws relating to WHS culture
- organisational documentation, information and data relating to strategy developed for the performance evidence
- real situations and, where possible, case studies
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS613 Evaluate the WHS performance of an organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to evaluate the effectiveness of an organisation's work health and safety (WHS) performance, including its hazard identification and WHS risk management arrangements, its processes for monitoring performance, and the outcomes of its WHS management arrangements. It also incorporates assessing and advising on compliance with established benchmarks and required legislation.

The unit applies to those who apply advanced practical knowledge to coordinate, facilitate and maintain the WHS program in an organisation.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.

2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative, or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential</i> | <i>Performance criteria describe the performance needed to</i> |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>outcomes.</i> | <i>demonstrate achievement of the element.</i> |
| 1. Evaluate effectiveness of organisation's WHS hazard identification arrangements | <p>1.1 Identify workplace hazard identification activities and compare them with organisational WHS policies and procedures</p> <p>1.2 Examine products, processes and systems to determine whether hazards of long latency and low frequency/high consequence are included and controlled</p> <p>1.3 Examine products, processes and systems to determine whether risks to persons other than workers are identified and controlled</p> <p>1.4 Identify organisational factors that impact on hazard identification</p> <p>1.5 Review outcomes of examinations with specialist personnel, as required</p> <p>1.6 Document outcomes of examination and report to required personnel according to organisational policies and procedures</p> |
| 2. Evaluate effectiveness of organisation's WHS risk management arrangements | <p>2.1 Evaluate appropriateness of the organisation's risk assessment tools and processes</p> <p>2.2 Assess outcomes of risk assessment processes with regard to validity, reliability and inclusion of all major WHS risks</p> <p>2.3 Evaluate implemented risk controls for suitability and effectiveness in relation to the organisation's management of WHS</p> <p>2.4 Document evaluation outcomes and distribute as required according to organisational policies and procedures</p> |
| 3. Evaluate effectiveness of organisation's WHS monitoring processes | <p>3.1 Identify organisational processes to monitor implementation and status of WHS management</p> <p>3.2 Evaluate quality of information and data obtained from monitoring processes</p> <p>3.3 Review effectiveness of communication and reporting processes in relation to monitoring the management of WHS</p> <p>3.4 Evaluate management's response to issues identified by the monitoring processes</p> <p>3.5 Document outcomes of evaluation of compliance and</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | report to required personnel |
| 4. Assess and advise on organisation's WHS compliance with established benchmarks and required legislation | <p>4.1 Identify industry benchmarks and required legislation</p> <p>4.2 Undertake systematic analysis to assess WHS compliance with established benchmarks and required legislation</p> <p>4.3 Identify and make recommendations to rectify WHS non-compliance with established benchmarks and required legislation</p> <p>4.4 Provide advice on compliance and non-compliance with WHS laws with regard to organisation's WHS management arrangements</p> <p>4.5 Document outcomes of compliance assessment and report to required personnel</p> |
| 5. Assess outcomes of organisation's WHS management arrangements | <p>5.1 Identify organisational processes to be assessed</p> <p>5.2 Evaluate performance indicators, including positive performance indicators (PPIs), to determine whether they provide a true, reliable and timely measure of effectiveness of organisation's WHS management</p> <p>5.3 Compare reported performance with evidence gathered, and document differences and noted trends</p> <p>5.4 Evaluate WHS performance outcomes and document them in a clear and objective manner</p> <p>5.5 Determine whether arrangements for managing WHS have produced improvement in WHS management</p> <p>5.6 Document outcomes of assessment and report to required personnel</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|---------|---|
| Reading | <ul style="list-style-type: none"> Interprets, analyses and evaluates complex organisational texts in relation to WHS policies, procedures, systems, and management arrangements |

| Skill | Description |
|----------------------------|--|
| Writing | <ul style="list-style-type: none"> Documents information about performance evaluation and compliance, matching style of writing to purpose and audience Uses appropriate vocabulary, grammatical structure and organisational conventions to produce required documents |
| Oral communication | <ul style="list-style-type: none"> Presents information, evaluation outcomes and recommendations using language appropriate to audience Uses questioning and active listening to seek clarification or confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Extracts, analyses and synthesises mathematical information in a range of workplace sources Selects from a range of mathematical and problem-solving strategies and techniques to evaluate WHS data for a range of purposes, including to identify trends Uses formal and informal oral and written mathematical language and representation to communicate about WHS risk management, evaluation and monitoring |
| Navigate the world of work | <ul style="list-style-type: none"> Keeps up to date on changes to WHS laws or regulations relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work |
| Interact with others | <ul style="list-style-type: none"> Recognises and applies the protocols governing what, with whom and how to communicate when working with specialist personnel |
| Get the work done | <ul style="list-style-type: none"> Uses logical planning processes and an increasingly intuitive understanding of context, to identify relevant information and risks, and to identify and evaluate alternative strategies and resources Reviews WHS management using systematic and analytical processes to set criteria, gather relevant information, and identify and evaluate options against agreed criteria Applies formal problem-solving processes when identifying factors impacting on WHS, resolving complex issues in manageable parts Uses a range of digitally-based technology and applications to access and filter data, and to extract, organise, integrate and share relevant information |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS604 Evaluate the WHS performance of organisations.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS613 Evaluate the WHS performance of an organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- evaluate and report on the effectiveness of the work health and safety (WHS) performance of at least one organisation.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws, guidance material and links to other legislation relevant to organisation's WHS performance, including:
 - hazard-specific WHS laws
 - requirements for recordkeeping
 - requirements for reporting, including obligations for notification and reporting of incidents
 - WHS information and data
 - WHS consultation and participation
 - roles of persons conducting a business or undertaking (PCBUs) or officers under WHS laws
- organisational WHS policies, procedures, processes and systems, including those for:
 - developing WHS performance assessment tools, including positive performance indicators (PPIs)
 - formal and informal communication and consultation processes
 - collecting information and data
 - providing evidence of compliance with WHS laws
 - recordkeeping
- legal liability in relation to providing advice

- nature and use of information and data that provide valid and reliable results about performance of WHS risk-management processes and PPIs, and limitations of other types of measures
- nature of workplace processes (workflow, planning and control) and WHS hazards relevant to workplace
- principles and practices of a systematic approach to managing WHS
- roles and responsibilities in relation to communication and consultation
- sampling methodologies and applications and related statistical measures
- methodologies for identifying and representing trends in performance data
- standard industry risk controls for a range of WHS hazards
- techniques, tools and processes for identifying WHS hazards and controlling associated risks, and their limitations.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- workplace strategic and operational plans, policies and procedures
- WHS information and data
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS614 Conduct a WHS audit under the guidance of a lead auditor

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to conduct a work health and safety (WHS) audit in a work area to establish if an organisation is implementing planned arrangements for managing WHS risks. It involves systematic examination against audit criteria to determine compliance against identified benchmark criteria.

The unit applies to those required to conduct a WHS audit under the guidance of a lead auditor. The WHS audit may be conducted by an individual or by a team, and may be concurrent with other management system audits or conducted as a standalone exercise.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|----------|----------------------|
|----------|----------------------|

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for WHS audit under the guidance of the lead auditor | 1.1 Define scope, objectives and benchmarks of audit under lead auditor's guidance 1.2 Identify and obtain relevant documentation about operation of organisation 1.3 Identify and arrange resources required to conduct audit under lead auditor's guidance 1.4 Assign timing, schedule and responsibilities for audit under lead auditor's guidance 1.5 Develop draft audit plan according to organisational policies and procedures under lead auditor's guidance 1.6 Submit draft audit plan to required personnel for consultation and feedback 1.7 Finalise documented plan in response to feedback and distribute to required personnel |
| 2. Select audit tools suitable to nature and scope of WHS audit under the guidance of the lead auditor | 2.1 Confirm own and lead auditor role in tool selection process with lead auditor 2.2 Identify range of available WHS audit tools and assess their suitability for intended purpose and work area 2.3 Establish that audit tools can be used with consistent outcomes by all members of audit team 2.4 Review audit tools to ensure they enable collection of evidence in a timely and efficient manner 2.5 Trial audit tools and modify as required |
| 3. Undertake WHS audit activities in work area under the guidance of the lead auditor | 3.1 Confirm own and lead auditor role in WHS audit activities with lead auditor 3.2 Undertake preliminary audit meetings and work area familiarisation 3.3 Use selected audit tools and consult with stakeholders to gather WHS information, data and records about work area, as required by the audit plan and according to organisational requirements, standards for safe work practices and applicable WHS laws 3.4 Promptly report uncontrolled hazards and related assessed risks identified during audit to key personnel, stakeholders and/or person in control of workplace |

| ELEMENTS | PERFORMANCE CRITERIA |
|------------------------------------|--|
| | <p>3.5 Note discrepancies in risk controls and risk management arrangements, and reasons for discrepancies, according to organisational policies and procedures</p> <p>3.6 Check reliability and validity of WHS information, data and records supporting audit activities with required sources</p> <p>3.7 Undertake exit audit meetings with required personnel and stakeholders</p> |
| 4. Report on outcomes of WHS audit | <p>4.1 Compare results of audit with audit benchmark criteria</p> <p>4.2 Develop summary audit findings and recommendations, consulting with stakeholders as required</p> <p>4.3 Present summary audit findings and recommendations to key personnel</p> <p>4.4 Document final audit outcomes according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies, interprets and analyses legislative and organisational texts relevant to WHS audit requirements Reviews and interprets information and data gathered during audit activities |
| Writing | <ul style="list-style-type: none"> Communicates information about audit plan, matching style of writing to purpose and audience Drafts and develops required documents using appropriate vocabulary, grammatical structure and organisational conventions |
| Oral communication | <ul style="list-style-type: none"> Presents information and ideas using vocabulary appropriate to audience and context Uses questioning and active |

| Skill | Description |
|----------------------------|--|
| | listening to facilitate discussion, seek clarification and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Extracts and evaluates mathematical information embedded in audit data and records Applies mathematical processes to set timeframes and compare or contrast data |
| Navigate the world of work | <ul style="list-style-type: none"> Identifies own and others' legal responsibilities in relation to WHS audit advice Keeps up to date on changes to WHS laws relevant to audit, and considers their implications when negotiating, planning and undertaking work |
| Interact with others | <ul style="list-style-type: none"> Applies the protocols governing what, with whom and how to communicate when gathering evidence and consulting Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion Negotiates agreement on the best course of action regarding audit recommendations |
| Get the work done | <ul style="list-style-type: none"> Uses logical planning processes and understanding of context to plan for audit Sequences and schedules activities, monitors implementation and manages relevant communication Involves others in the selection of audit tools or methods, using consultative or collaborative processes as part of the decision-making process when appropriate Maintains systematic records of data-gathering activities |

| Skill | Description |
|-------|---|
| | <ul style="list-style-type: none">• Uses systematic and analytical processes in non-routine situations: sets goals, gathers relevant information, and identifies and evaluates options against agreed benchmark criteria• Uses digital systems and tools to access, record, organise, analyse and display information• Validates audit findings and reflects organisational constraints and challenges in audit recommendations |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS606 Conduct a WHS audit.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS614 Conduct a WHS audit under the guidance of a lead auditor

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- prepare for and conduct one work health and safety (WHS) audit under the guidance of a lead auditor.

During the above, the candidate must:

- outline purpose, scope and objectives of audit in a preliminary meeting
- develop and implement a WHS audit plan suited to the work area, which reflects nature and scope of required audit
- select, develop, trial and modify WHS audit tools suited to audit and work area
- gather information, data and WHS records, consulting required range of workplace personnel
- report on WHS audit outcomes
- make recommendations in areas where improvements are identified
- work effectively under the guidance of a lead auditor.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS legislative responsibilities, duties and obligations of managers, supervisors, workers and persons conducting a business or undertaking (PCBUs) or officers
- WHS legislative requirements regarding:
 - communication, consultation and participation processes in a WHS audit
 - notification of incidents
 - audit recordkeeping
 - hazard identification and risk assessment methods

- procedures for identifying WHS audit tools and assessing their suitability
- nature and use of information and data that provide valid and reliable results about performance of WHS risk-management processes and positive performance indicators, and limitations of other types of measures
- key components of a WHS audit plan, including:
 - nature of information and data to be collected
 - key audit personnel
 - information and data collection strategies that ensure security, confidentiality, impartiality and equity
 - process that includes opportunities for corroborating performance evidence collected
- principles and practices of WHS audit, including:
 - reflecting understanding of nature of workplace, work processes, and hazards and controls relevant to workplace
 - methods for collecting reliable WHS information and data
 - methods for interviewing those subject to audit, including arrangements to validate audit findings
 - strategies for addressing commonly encountered problems in collection, and adapting to contingencies as they arise to meet WHS legislative and audit outcome requirements
 - methods for collecting evidence of compliance with WHS laws
 - consulting with required personnel, including lead auditor
- key components of audit findings, including:
 - recommendations
 - non-compliances, uncontrolled hazards and associated risks
 - objective evidence and rationale
- procedures for developing and using benchmark criteria during WHS audit, including positive performance indicators (PPIs)
- features of good-practice WHS audit tools
- internal and external sources of WHS information and data, and procedures for accessing them
- requirements for recordkeeping that address WHS, privacy, confidentiality and other legislative requirements
- roles and responsibilities of internal and external personnel as they apply to WHS audit
- legal liability in relation to providing WHS audit advice
- role of lead auditor and own relationship to lead auditor.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- lead auditor

- organisational documentation, information and data required for WHS audits
- WHS laws, and organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS616 Apply safe design principles to control WHS risks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to apply safe design principles to control work health and safety (WHS) risks in a product's life cycle. It involves engaging at different points of the supply chain to provide advice based on safe design principles. The central feature of safe design is the application of relevant information and data about human experience, capabilities and behaviour to the design of objects, facilities, procedures and environments that people use.

The unit applies to those who apply the principles of safe design in their organisation, which may be at one or more stages of the product's life cycle, including procurement, installation, operation and disposal. Products may refer to plant, tools and equipment. The application of safe design principles aims to eliminate or minimise hazards and their associated risks before an existing product, or a product being developed or modified, is introduced into the workplace.

NOTES

1. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. For the purposes of this unit of competency 'safe design' refers to a process defined as the integration of hazard identification and risk assessment methods to eliminate or minimise the risk of injury throughout the life cycle of plant, tool or equipment being designed.
3. For the purposes of this unit of competency a 'product' refers to any plant, tool or equipment.
4. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Advise on WHS principles that support safe design | <p>1.1 Advise decision-makers of their duties under WHS laws to manage WHS risks throughout a product's life cycle</p> <p>1.2 Source and make available to decision-makers the most current information and data on WHS principles, materials, technology and systems that apply to product design</p> <p>1.3 Advise on methods and tools that can support WHS hazard identification and WHS risk assessment throughout a product's life cycle</p> <p>1.4 Identify and address learning and development needs of decision-makers to manage WHS risks that may arise during a product's life cycle, including during its design phase</p> <p>1.5 Advise on consultation with known and/or potential users of the product during the design phase, according to organisational policies and procedures</p> <p>1.6 Identify situations where specialist and other advisers may be required to support safe design activities</p> |
| 2 Advise on systematic approach to WHS risk management for safe design | <p>2.1 Advise on selection and implementation of required WHS risk controls in design, based on the hierarchy of control measures</p> <p>2.2 Advise on documentation requirements relating to decision-making during risk assessment process</p> <p>2.3 Advise on establishment of a residual WHS risk register and distribution of this information to those involved in downstream or subsequent product life-cycle stages</p> <p>2.4 Advise on monitoring the design as it evolves, to identify and manage potential WHS hazards that may arise during product life cycle and their associated risks</p> <p>2.5 Identify and address learning and development needs of decision-makers in relation to managing design-related WHS risks in a product's life cycle</p> |
| 3 Advise on consultation | 3.1 Support decision-makers in considering the needs of those |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| processes in product's life cycle | <p>using or interacting with product throughout its life cycle</p> <p>3.2 Facilitate involvement of technical experts as required according to organisational processes and procedures</p> <p>3.3 Advise on consultation arrangements with required personnel during all phases of design process to identify WHS hazards and control WHS risks that may occur throughout a product's life cycle</p> <p>3.4 Advise on communicating residual WHS risks in product to those who will use or interact with the product throughout its life cycle</p> |
| 4 Advise on procurement systems to minimise 'purchased' WHS hazards and their associated risks | <p>4.1 Advise decision-makers involved in purchasing and contractual arrangements to include requirements to identify WHS hazards and control WHS risks, and to provide information and data on residual WHS risks as part of procurement process</p> <p>4.2 Advise on including a requirement to carry out a safe design approach in the design brief or draft specifications</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Reading | <ul style="list-style-type: none"> Identifies, interprets and analyses legislative and organisational texts relevant to safe design |
| Writing | <ul style="list-style-type: none"> Develops advice and recommendations about safe design, matching style of writing to purpose and audience |
| Oral communication | <ul style="list-style-type: none"> Presents information and advice using language appropriate to audience Uses questioning and active listening to seek information and confirm understanding |
| Numeracy | <ul style="list-style-type: none"> Selects from and applies a range of mathematical strategies to interpret |

| Skill | Description |
|----------------------------|--|
| | <p>and analyse mathematical information embedded in a range of texts</p> <ul style="list-style-type: none"> • Applies mathematical processes to assess risk levels • Uses oral and written mathematical language and representation to communicate advice on WHS risk management in safe product design |
| Navigate the world of work | <ul style="list-style-type: none"> • Applies legal responsibilities to WHS product design compliance contexts • Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications when advising on compliance in relation to product design |
| Interact with others | <ul style="list-style-type: none"> • Actively identifies requirements of communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience • Monitors impact of communication exchanges when providing advice that relates to safe design • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role |
| Get the work done | <ul style="list-style-type: none"> • Uses logical planning processes and understanding of context to organise training and identify specialist needs • Uses systematic and analytical processes in complex, non-routine situations: sets goals, gathers relevant information, identifies and evaluates options against agreed criteria, and seeks input and advice from others before taking necessary action • Identifies the potential of new |

| Skill | Description |
|-------|---|
| | <p>approaches to product life-cycle risk management to enhance safe design work practices and outcomes</p> <ul style="list-style-type: none">• Uses digital systems and tools to access, record, organise, analyse, display and share information |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS609 Advise on the application of safe design principles to control WHS risks.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS616 Apply safe design principles to control WHS risks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- apply safe design principles to control work health and safety (WHS) risks that may occur throughout the life cycle of at least two different products.

During the above, the candidate must:

- provide advice based on WHS legislative requirements and safe design principles in relation to:
 - developing a systematic WHS risk-management approach to safe design
 - consultation processes relating to safe design in a product's life cycle
 - procurement systems to minimise 'purchased' WHS hazards and their associated risks.
 -

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- commonwealth and state/territory WHS laws, publications and guidelines relating to consultation, participation and safe design, including:
 - Safe Work Australia codes of practice and guidance information that relate to safe design
 - requirements for managing WHS risks and implementing controls at each life-cycle stage of a product
 - requirements relating to consultation processes
 - legislative duties of persons conducting a business or undertaking (PCBUs) or officers who are designers or are responsible for safe design processes
- factors involved in selecting WHS risk controls for product design, including:

- ensuring that level and reliability of risk control is commensurate with likelihood and impact of risk
- impact on safety of alterations to product during its life
- minimising impact of possible failure or defect by ensuring controls include fail-safe action
- WHS principles, materials, technology and systems that apply to product design
- internal and external sources of WHS information and data, and procedures for accessing them
- human cognitive and perceptual capabilities and other basic factors relevant to the safe design of products in the performance evidence
- factors affecting safe design, including work-related psychosocial factors, occupational violence, shift work, repetitive work, awkward postures, lighting, thermal environment and work layout
- principles of anthropometry and biomechanics as they relate to safe design principles to control WHS risks
- communication and consultation processes, and key personnel related to communication
- hierarchy of control measures and criteria for choosing between different WHS risk controls
- key personnel, including change agents, within workplace management structure
- legal liability in relation to providing advice
- organisational behaviour and culture as they impact on WHS, and on change
- WHS risk management and the principles and practices of a systematic approach to WHS management.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- reports from other parties consulted about WHS risk in a product's life cycle
- legislation, standards, guidelines, research and industry data required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS617 Apply ergonomics to manage WHS risks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to apply the principles, processes and methods of ergonomics to work health and safety (WHS) risk management, and to the enhancement of WHS-related planning and design activities and processes.

The unit applies to those who manage WHS risks and who need to consider the role ergonomics plays in this process. These individuals will apply advanced skills and knowledge to coordinate, facilitate and maintain the WHS program in an organisation. This role may involve working with ergonomists or human-factor specialists.

NOTES

1. The terms ‘occupational health and safety’ (OHS) and ‘work health and safety’ (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
2. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.
3. Ergonomics applies theories, principles, data and methods to design in order to optimise human wellbeing and overall system performance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Apply ergonomics to WHS hazard identification | <p>1.1 Identify and evaluate relevant WHS laws, organisational policies and procedures relating to ergonomics</p> <p>1.2 Interpret workplace WHS information and data to identify WHS hazards relating to ergonomics</p> <p>1.3 Apply knowledge of ergonomics principles, processes and methods to identify workplace WHS hazards</p> |
| 2. Use ergonomics to address WHS risks | <p>2.1 Apply ergonomics principles, processes and methods in the assessment of WHS risks</p> <p>2.2 Apply ergonomics principles, processes and methods in the development of risk controls</p> <p>2.3 Apply ergonomics principles, processes and methods in the evaluation of risk controls</p> |
| 3. Apply ergonomics in WHS-related planning and design activities | <p>3.1 Analyse WHS-related planning and design activities and processes</p> <p>3.2 Assess opportunities to apply ergonomics principles, processes and methods to enhance WHS-related planning and design activities</p> <p>3.3 Apply ergonomics principles, processes and methods to enhance WHS-related planning and design activities</p> <p>3.4 Review and evaluate enhancements to WHS-related planning and design activities according to organisational policies and procedures</p> |
| 4. Ensure that ergonomics activities are compliant and appropriate | <p>4.1 Review ergonomics activities to confirm their compliance with applicable WHS laws and other relevant documents</p> <p>4.2 Review ergonomics activities to confirm their compliance with relevant organisational processes, procedures, standards and systems</p> <p>4.3 Apply appropriate ergonomics principles, processes and methods according to available resources and own role, responsibilities, skills and knowledge</p> <p>4.4 Seek advice, support and input from specialists as required according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none">Identifies, interprets and analyses legislative and organisational texts relevant to ergonomic activities |
| Writing | <ul style="list-style-type: none">Communicates information about ergonomic principles, processes, and methods, matching style of writing to purpose and audienceDrafts and develops required documents using appropriate vocabulary, grammatical structures and organisational conventions |
| Oral communication | <ul style="list-style-type: none">Uses questioning and active listening to seek information and confirm understanding |
| Navigate the world of work | <ul style="list-style-type: none">Identifies own responsibilities regarding ergonomic activities in WHS compliance contextsKeeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking workContributes, as appropriate, to the work of others in the immediate work context when applying ergonomics |
| Interact with others | <ul style="list-style-type: none">Selects and uses appropriate conventions and protocols to build and maintain relationships with external people who can provide specialist support |
| Get the work done | <ul style="list-style-type: none">Uses logical planning processes and understanding of context to identify where ergonomics can be applied in the workplaceSequences and schedules activities, monitors implementation and manages relevant communicationUses systematic and analytical |

| Skill | Description |
|-------|--|
| | <p>processes in non-routine situations: sets goals, gathers relevant information, identifies and evaluates options against agreed criteria, and seeks input and advice from others before taking necessary action</p> <ul style="list-style-type: none">• Identifies the potential of new approaches in applying ergonomics to enhance work practices and outcomes• Uses digital systems and tools to access, record, organise, analyse and display information |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS607 Apply ergonomics to manage WHS risks.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS617 Apply ergonomics to manage WHS risks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- identify at least three different work health and safety (WHS) hazards relating to ergonomics, and manage their associated risks
- apply ergonomic interventions in at least two different WHS-related planning and design activities
- seek specialist input during at least one of the above activities.

During the work, the candidate must ensure these ergonomics activities are:

- compliant with:
 - legislative requirements
 - organisational policies and procedures
 - applicable professional standards
- appropriate to:
 - available resources
 - own role and capabilities.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- ergonomics-related content of applicable WHS laws and other relevant documents, such as policies, standards, guidance publications and alerts issued by the relevant WHS regulators and professional bodies
- organisational policies and procedures relating to ergonomics and the performance evidence

- key theories, principles, data and methods relating to ergonomics, and the domains of specialisation within the discipline of ergonomics
- principles, processes and methods of ergonomics applicable to:
 - identifying WHS hazards and managing associated risks
 - WHS-related planning and design activities and processes
- expertise, roles and functions of ergonomists, and skills and techniques relevant to the performance evidence
- scope and broad content of Australian and international ergonomics standards
- systems and system concepts used in ergonomics.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws required to demonstrate the performance evidence
- reports from other parties consulted when developing ergonomic interventions
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWHS631 Apply occupational hygiene principles to manage WHS risks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Application

This unit describes the skills and knowledge required to apply occupational hygiene principles, knowledge, skills and techniques to manage work health and safety (WHS) risks. It includes identifying workplace hazards and managing risks associated with occupational hygiene, and engaging specialist assistance. It requires in-depth knowledge of the hierarchy of control measures and its use in developing risk control strategies for occupational hygiene. The unit also includes ensuring that occupational hygiene activities are appropriate, and that training needs are met.

The unit applies to those who apply occupational hygiene principles to manage WHS risks.

NOTES

1. For the purposes of this unit of competency 'occupational hygiene' refers to the use of science and engineering to measure the extent of worker exposure to something in the work environment that has the potential to cause harm. An occupational hygiene approach to WHS risks uses science and engineering to design and implement appropriate risk control strategies to prevent ill health caused by the work environment.
2. The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent, and generally either can be used in the workplace. In jurisdictions where *model WHS laws* have not been implemented, registered training organisations (RTOs) are advised to contextualise this unit of competency by referring to existing WHS legislative requirements.
3. The *model WHS laws* include the model WHS Act, model WHS Regulations and model WHS Codes of Practice. See Safe Work Australia for further information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – Work Health and Safety

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify WHS hazards to be addressed by occupational hygiene | 1.1 Identify and evaluate relevant WHS laws, organisational policies and procedures relating to occupational hygiene 1.2 Use workplace WHS information to identify exposure to WHS hazards that could give rise to worker ill health 1.3 Apply knowledge of occupational hygiene principles, skills and techniques to identify workplace WHS hazards to be addressed through occupational hygiene 1.4 Determine and document sources of exposure to identified hazards 1.5 Identify and document situations where WHS specialists and other advisers may be required according to organisational policies and procedures |
| 2. Assess identified occupational hygiene risks | 2.1 Select and use occupational hygiene equipment and techniques for assessing occupational hygiene risks relating to identified hazards according to organisational policies and procedures 2.2 Analyse and interpret results of assessments according to organisational policies and procedures, and exposure standards 2.3 Consult with specialists as required according to organisational policies and procedures to inform recommendations 2.4 Report results of risk assessments, interpretations and recommendations to required personnel |
| 3. Design and implement risk controls | 3.1 Apply the hierarchy of control measures when assisting with design of risk controls for assessed risks 3.2 Analyse information and data to identify deficiencies in existing risk controls 3.3 Implement suitable new risk controls and assist in providing remedial advice about existing risk controls according to organisational policies and procedures 3.4 Ensure effective consultation with, and participation of, |

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| | required internal personnel 3.5 Access external sources of information and data, WHS specialists and other advisers as required about nature and level of health hazards, risks and risk controls |
| 4. Monitor, evaluate and modify risk controls | 4.1 Monitor and evaluate risk controls to address risks relating to occupational hygiene in consultation with required personnel 4.2 Modify risk controls in consultation with required personnel 4.3 Identify and document training needs associated with risk controls and arrange training in consultation with required personnel 4.4 Make recommendations about future arrangements for monitoring and evaluating risk controls |
| 5. Confirm occupational hygiene activities are appropriate | 5.1 Confirm that occupational hygiene activities comply with required WHS laws 5.2 Confirm that occupational hygiene activities comply with required organisational procedures, processes, standards and systems 5.3 Apply appropriate occupational hygiene principles, knowledge, skills and techniques according to available resources and own role, responsibilities, skills and knowledge 5.4 Seek advice, support and input from specialists and other advisers as required and appropriate |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none">Identifies, interprets and analyses legislative and organisational texts relevant to occupational hygiene activities |
| Writing | <ul style="list-style-type: none">Matches style and content of report writing to purpose, audience and organisational reporting requirementsDrafts and develops required documents using appropriate vocabulary, grammatical structure and organisational conventions |
| Oral communication | <ul style="list-style-type: none">Presents information and ideas using language appropriate to audienceUses questioning and active listening to seek information and confirm |

| Skill | Description |
|----------------------------|--|
| | understanding |
| Numeracy | <ul style="list-style-type: none">• Uses equipment to take measurements• Selects from and applies a range of mathematical strategies to interpret and analyse measurements• Uses oral and written mathematical language and representation to communicate test results |
| Navigate the world of work | <ul style="list-style-type: none">• Keeps up to date on changes to WHS laws relevant to own role and responsibilities, and considers their implications when negotiating, planning and undertaking work• Contributes to the work of others in occupational hygiene contexts |
| Interact with others | <ul style="list-style-type: none">• Collaborates with others to achieve joint outcomes• Selects and uses suitable conventions and protocols to build and maintain relationships with people who can provide external specialist support |
| Get the work done | <ul style="list-style-type: none">• Uses logical planning processes and understanding of context in identifying hazards and managing risks addressed by occupational hygiene• Uses systematic and analytical processes in complex, non-routine situations: sets goals, gathers relevant information, identifies and evaluates options against agreed criteria, and seeks input and advice from others before taking necessary action• Identifies potential of new approaches to enhancing work practices and outcomes in relation to application of occupational hygiene risk controls• Uses digital systems and tools to access, record, organise, analyse and display information |

Unit Mapping Information

Supersedes and is equivalent to BSBWHS608 Assist with applying occupational hygiene to manage WHS risks.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWHS631 Apply occupational hygiene principles to manage WHS risks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 5.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, and to:

- apply occupational hygiene principles, processes, skills and techniques in managing at least two different work health and safety (WHS) hazards that present occupational hygiene risks to workers, using:
 - workplace WHS information
 - knowledge of WHS laws, and organisational policies and procedures relating to occupational hygiene
 - knowledge of occupational hygiene principles, processes, skills and techniques
 - the hierarchy of control measures to design and implement risk controls
- seek specialist input or advice during at least one of these activities.

During the above, the candidate must:

- assess occupational hygiene risk associated with these WHS hazards
- monitor, evaluate and modify risk controls relating to occupational hygiene
- ensure occupational hygiene activities are legislatively and organisationally compliant and appropriate.
-

Knowledge Evidence

The candidate must demonstrate the knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit. This includes knowledge of:

- WHS laws relating to occupational hygiene, including roles and responsibilities of persons conducting a business or undertaking (PCBUs) or officers under WHS laws
- exposure standards and other standards and guidelines used in occupational hygiene, including their limitations and practical applications
- occupational hygiene principles, knowledge, skills, techniques and methodologies

- characteristics of WHS hazards and risks addressed by occupational hygiene, their effects on people and how these effects occur
- common risk controls for a range of environmental hazards and associated occupational hygiene risks, their effectiveness and their limitations
- organisational policies, procedures, processes and systems relating to occupational hygiene and the performance evidence
- key principles, uses and components of the hierarchy of control measures in managing risks associated with occupational hygiene, including:
 - nature and scope of risk controls
 - requirements for selecting personal protective equipment (PPE), and limitations of its use
- key concepts, processes and procedures for applying occupational hygiene in managing WHS risks:
 - sources of environmental hazards and routes of exposure to them
 - sources of occupational disease and its prevention
 - risks addressed by occupational hygiene
 - developing, implementing and evaluating occupational hygiene risk controls
 - methods for occupational hygiene assessments and investigations
 - training, education, roles, functions and skills of occupational hygienists
 - types, purposes, functions and uses of occupational hygiene equipment
 - requirements for individual training and instruction in risk controls, including in the use of PPE
- workplace processes, activities, jobs and tasks relevant to occupational hygiene
- roles and functions of specialists, including occupational hygienists, occupational medicine physicians, other medical doctors and toxicologists
- procedures for working with occupational hygiene specialists and other WHS personnel to control WHS risks.
-

Assessment Conditions

Assessment must comply with WHS laws, legal responsibilities and duty of care required for this unit. It must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities undertaken by individuals carrying out WHS duties in the workplace, and must include access to:

- WHS laws, standards and guidelines required to demonstrate the performance evidence
- occupational hygiene equipment that meets relevant standards for function and performance
- organisational policies and procedures required to demonstrate the performance evidence
- case studies and, where possible, real situations
- opportunities for interaction with others.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWRT311 Write simple documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan, draft and finalise a simple document.

The unit applies to individuals who administer a broad range of competencies in various work contexts and may exercise some discretion and judgement to produce a range of simple documents.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Written Communication

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan simple document | 1.1 Determine audience, purpose and requirements for document according to organisation policies and procedures 1.2 Determine required format, style and structure for document 1.3 Establish method of communication 1.4 Establish key points for inclusion |
| 2. Draft simple document | 2.1 Develop draft document to communicate key points according to purpose and requirements for document 2.2 Check that draft meets document purposes and requirements 2.3 Obtain and include additional required information |
| 3. Finalise simple | 3.1 Ensure draft is proofread, where appropriate, by supervisor or |

| ELEMENT | PERFORMANCE CRITERIA |
|----------|---|
| document | colleague 3.2 Make and proofread necessary changes |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none">Interprets a variety of text to determine and confirm task requirementsProofreads document checking for grammar, spelling, structure, and suitability of style and format for audience |
| Oral Communication | <ul style="list-style-type: none">Uses listening and questioning skills to seek additional information or confirmation of task completion |
| Self-management | <ul style="list-style-type: none">Follows accepted communication practices and protocols when seeking information or feedback from othersTakes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes |
| Technology | <ul style="list-style-type: none">Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBWRT301 Write simple documents.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWRT311 Write simple documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan, draft and finalise three different simple documents that accurately convey the required basic information in a format suitable for the intended audience and purpose according to organisational policies and procedures for document production.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- processes for checking:
 - basic readability, grammar, spelling, sentence and paragraph sequencing and structure, and punctuation
 - suitability of document for audience, purpose, and format
- organisational policies and procedures relating to written communication
- written communication methods, including:
 - general emails
 - procedures
 - business letters
 - meeting agendas
- different formats, styles and structures for documents.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment and resources to assist in the production of documents

- organisational policies and procedures
- examples of documents to review.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBWRT411 Write complex documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Application

This unit describes the skills and knowledge required to plan, draft and finalise complex documents.

The unit applies to individuals who work in a range of business environments and are skilled in the creation of documents that are more complex than basic correspondence, memos and/or forms and that require review and analysis of a range of information sources.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Social Competence – Written Communication

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan complex document | 1.1 Determine audience, purpose and requirements of document according to organisation policies and procedures 1.2 Determine required format, style and structure for document 1.3 Establish method of communication 1.4 Develop content overview of document 1.5 Determine categories and logical sequence of information according to proposed structure, content and document requirements |
| 2. Draft complex document | 2.1 Confirm information is cohesive and satisfies document purpose and requirements 2.2 Develop draft document to communicate data, information and |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------|--|
| | knowledge according to organisational policies and procedures 2.3 Identify gaps in required data, information and knowledge, and collect additional material from relevant sources, if required 2.4 Draft text according to document purposes and requirements |
| 3. Finalise complex document | 3.1 Review draft text and confirm document purpose and requirements are met 3.2 Check grammar, spelling and style for accuracy and punctuation 3.3 Confirm draft text is approved by relevant organisation personnel 3.4 Review and incorporate any amendments in final copy 3.5 Apply basic design elements for document appropriate to audience and purpose 3.6 Check document and confirm all requirements are met |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|---|
| Reading | <ul style="list-style-type: none">Interprets a variety of text to determine and confirm task requirementsProofreads document checking for grammar, spelling, structure, and suitability of style and format for audience |
| Oral Communication | <ul style="list-style-type: none">Uses listening and questioning skills to seek additional information or confirmation of task completion |
| Self-management | <ul style="list-style-type: none">Follows accepted communication practices and protocols when seeking information or feedback from othersTakes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes |
| Technology | <ul style="list-style-type: none">Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

Supersedes and is equivalent to BSBWRT401 Write complex documents.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBWRT411 Write complex documents

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- plan, draft and finalise three different complex documents that convey the required information in a format suitable for the intended audience and purpose according to organisational policies and procedures for document production.

In the course of the above, the candidate must:

- review and analyse a range of information sources
- use business technology to apply formatting and incorporate graphics
- apply organisation style guide/house style.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisation style guide/house style
- format and its impact on readability, cohesion and appearance of document
- categories and logical sequences of information
- rules and conventions for written English
- key features of word processing software
- key features of written communication methods, including:
 - general emails
 - procedures
 - business letters
 - meeting agendas
- organisational policies and procedures relating to written communication
- process for checking:
 - suitability of document for audience, purpose, format, and structure

- grammar, spelling and style for accuracy and punctuation
- key text elements including basic design elements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment and resources
- organisational policies and procedures
- organisational style guides.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXBD401 Capture and store big data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to capture and store transactional and non-transactional big data obtained from a variety of sources. It involves using methodologies and techniques to obtain big data sets. It also involves analysing and storing the captured big data according to industry practices and organisational policies, procedures and protocols.

It applies to those in a broad range of industries and job roles who, under some supervision and guidance, are responsible for obtaining, preparing and storing big data.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine scope of big data capture | 1.1 Identify business need for big data capture 1.2 Determine timelines for capturing big data 1.3 Identify volume and variety of big data to be captured 1.4 Identify data storage and archive requirements |
| 2. Capture big data | 2.1 Develop a plan for big data capture according to organisational policies and procedures 2.2 Identify sources of big data relevant to business need 2.3 Obtain big data from identified sources according to legislative requirements and organisational policies and procedures |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------|---|
| | 2.4 Apply big data cleansing methodologies 2.5 Re-create and recover big data lost during capture process according to organisational policies and procedures 2.6 Conduct data offload and archiving on big data and create report |
| 3. Store captured big data | 3.1 Organise obtained big data sets in a retrievable format 3.2 Confirm that big data is accurate, up-to-date, and comprehensive 3.3 Securely store big data and data capture report according to organisational procedures, legislative requirements, and industry practices |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical data Completes at times complex calculations and records numerical data |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to identify work requirements |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to report on big data capture and storage |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequences the stages of big data capture and storage |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to capture and store big data |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD401 Capture and store big data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- capture, apply data cleansing, and store one set of transactional and one set of non-transactional big data relating to specific workplace needs
- create a report relating to data capture for a specific workplace need for at least one set of transactional and one set of non-transactional big data.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to big data capture and storage, including data protection, security and privacy laws and regulations
- organisational policies and procedures relating to big data capture and storage, including for:
 - capturing, storing and reporting transactional and non-transactional sources of big data
 - cleansing methodologies when capturing big data
 - business intent of big data capture
 - re-creating and recovering big data lost during capture process
 - privacy concerns of predictive analytics organising security and retrieval of big data
 - quality assuring captured big data
- data capture techniques to produce analytic ready data and datasets
- big data features and their impact on data capture and storage, including velocity, volume, variety, value, and veracity
- variability and complexity of big data:
 - structured and unstructured
 - transactional and non-transactional
- framework for distributed storage of big data

- platform solutions for capturing and storing big data
- key features of organisational products and services related to big data capture
- technologies, techniques and protocols for capturing, storing and retrieving big data
- secure data access and control mechanisms of captured and stored big data
- high availability and scalability challenges with big data.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and data sources to inform big data capture
- information and telecommunications equipment required to capture and store big data
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXBD402 Test big data samples

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to test captured transactional and non-transactional big data samples prior to using them in the organisation. It involves assembling or obtaining raw big data, processing that big data, and testing it in a way that enables it to be used more broadly within the organisation.

It applies to those who work in a broad range of industries using data analysis techniques in the management of their day-to-day work.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Validate assembled or obtained big data sample | 1.1 Establish a sampling strategy for big data testing and identify a representative sample for big data testing 1.2 Assemble or obtain sample of raw big data according to legislative requirements and organisational policies and procedures 1.3 Validate big data sample from various sources to ensure that big data is correct |
| 2. Validate big data sample process and business logic | 2.1 Align datasets to relevant parts of the organisation 2.2 Implement data aggregation and segregation rules on a small set of sample data and datasets |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | 2.3 Consult with required personnel to clarify and resolve identified anomalies 2.4 Conduct performance testing for data throughput, data processing and sub-component performance |
| 3. Validate output of captured big data sample and record results | 3.1 Design, formulate and select suitable test scenarios and test cases to validate output of big data sample 3.2 Implement selected test scenarios and test cases with big data sample using common testing tools and according to organisational procedures 3.3 Isolate sub-standard data and correct data acquisition paths as required 3.4 Generate and store results of validation activity and associated supporting evidence according to organisational policies and procedures, and legislative requirements |
| 4. Optimise big data sample results and documentation | 4.1 Perform data cleansing on big data sample following testing according to industry practices and organisational procedures 4.2 Collate validated output of testing, confirming absence of big data corruption in sample 4.3 Recommend configuration optimisation changes based on performance testing results 4.4 Communicate final sample results to required personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to feedback during big data testing |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical data completes at times complex calculations and records numerical data |
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from relevant sources to complete work |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to represent test results |

| Skill | Description |
|-------------------------|--|
| Planning and organising | <ul style="list-style-type: none">Efficiently and logically sequences the stages of big data testing |
| Technology | <ul style="list-style-type: none">Uses appropriate technology platforms and query languages and scripts to test big data |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD402 Test big data samples

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- test two different big data samples: one transactional and one non-transactional
- conduct performance testing on two different big data samples: one transactional and one non-transactional.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to testing big data sources, including data protection and privacy laws and regulations
- industry protocols and procedures required to write queries and scripts for big data testing
- organisational policies and procedures relating to testing big data sources, including:
 - assembling and obtaining raw big data
 - performing data cleansing following extract, transform and load (ETL) testing
 - isolating sub-standard data and correcting data acquisition paths
 - quality assuring output
 - testing transactional and non-transactional sources of big data
 - storing test results and associated support evidence
- big data validation protocols, including:
 - big data testing methodologies
 - test scripting
- features and formats of common big data sources, including:
 - batched
 - real time
 - interactive
- protocols and techniques for:

- performance testing big data throughput
- processing and reporting issues.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to test big data sources
- big data sets to be tested
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXBD403 Analyse big data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to analyse transactional and non-transactional big data in order to provide insights that are used in an organisation. It involves identifying trends and relationships within big data, and establishing data acceptability. It also involves forming recommendations based on the analysis, and reporting on analysis findings.

It applies to those who work in a broad range of industries and job roles using big data analysis techniques in their day-to-day work.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine purpose and scope of big data analysis | 1.1 Determine organisational requirements for big data analysis 1.2 Identify internal and external sources of big data to be analysed according to organisational policies and procedures and legislative requirements 1.3 Establish and confirm parameters to be applied in analysis according to organisational policies and procedures |
| 2. Analyse initial | 2.1 Categorise and prepare captured big data for analysis |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| trends and relationships in captured big data | 2.2 Extract and transform structured and unstructured big data in preparation for data analysis 2.3 Analyse big data and derive insights into trends using required tools and dashboards |
| 3. Finalise big data analysis | 3.1 Conduct statistical analysis to confirm accuracy of big data analysis 3.2 Isolate and remove identified incorrect results 3.3 Develop report on key outcomes from analysis 3.4 Store analytics results, associated report and supporting evidence according to organisational policies and procedures, and legislative requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical and statistical concepts required to analyse big data Completes at times complex calculations and records numerical data |
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from sources to complete work |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to represent outcomes of big data analysis in reports |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequences the stages of big data analysis |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to analyse big data Basic programming to conduct big data analysis |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD403 Analyse big data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- analyse trends and relationships in two different sets of big data: one transactional and one non-transactional
- report on the results and insights from each analysis
- store analytics results from each of the two big data sets according to organisational policies and procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- purpose and benefits to organisation of big data analysis
- legislative requirements relating to analysing big data, including data protection and privacy laws and regulations
- organisational policies and procedures relating to analysing big data, including for:
 - identifying big data sources
 - establishing and confirming categories to be applied in analysis
 - analysing data to identify business insights
 - integrating big data sources, including structured, semi-structured, and unstructured
 - combining external big data sources, such as social media, with in-house big data
 - reporting on analysis of big data, including the use of suitable reporting and business intelligence (BI) tools
- industry protocols and procedures required to write basic queries to search combined big data
- required analytical techniques and tools to analyse transactional and non-transactional big data, including:
 - data mining
 - ad hoc queries

- operational and real-time business intelligence
- text analysis
- statistical concepts relating to big data analytics
- relationship between raw big data and big datasets
- common models and tools to analyse big data, including features and functions of Excel software for advanced analytics of external big data
- sources of uncertainty within big data
- classification categories of analytics, including text, audio/video, web and network
- role of technology and automation tools in performing big data analytics.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to analyse big data
- big data sets to be analysed
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXBD404 Use big data for operational decision making

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to analyse, interpret and apply insights from big data when making operational decisions. It involves applying skills in decision making and techniques for using big data in day-to-day work.

It applies to those who work in leadership and management positions, including in their own small business, in a broad range of industries who use big data analytics to drive their operational decision making.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify business requirements relating to big data | 1.1 Scope and confirm operational decision-making requirements 1.2 Identify opportunities for use of big data in business decision making 1.3 Confirm nature and scope of report requirements |
| 2. Interpret big data sources and summaries | 2.1 Access required big data sources and summaries according to organisational policies and procedures and legislative requirements 2.2 Apply insight analysis and descriptive statistics that support operational decision making 2.3 Use findings to identify insights that relate to identified operational decision-making requirements |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| 3. Make operational decision based on big data analysis | 3.1 Draft report on data analytics, applying identified insights to operational decision-making requirements 3.2 Seek input and integrate feedback from required stakeholders according to organisational policies and procedures 3.3 Finalise and distribute recommendations to required personnel according to organisational and legislative requirements |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Uses mathematical concepts and statistics required to use big data for operational decision-making Completes at times complex calculations and records numerical data |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens when seeking input and feedback |
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from relevant sources to complete work |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to represent outcomes of big data analysis in reports |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequences big data analytics to draw out insights and trends |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms when using big data |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD404 Use big data for operational decision making

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- interpret and use a big data set as the basis for two different operational decisions in work area.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to accessing and using sources and summaries of big data and big data sets, including data protection and privacy laws and regulations
- organisational policies and procedures relating to using big data, including for:
 - scoping and confirming operational decision-making requirements
 - accessing big data sources and summaries
 - combining external big data sources, such as social media, with in-house big data sets
 - integrating big data and analytics into operational workflow
 - reporting on use of big data in relation to operational decisions described in performance evidence
 - seeking input and feedback from required stakeholders
 - distributing report on big data analytics
- operational decision-making requirements relating to use of big data, including timelines
- procedures for data-driven decision making, including what-if analysis scenarios and tools for optimisation and simulations
- techniques for presenting big data analytics:
 - charts
 - heat maps
 - scatterplots
 - dashboards

- statistical tools
- key programming protocols and techniques required to use big data for operational decision making
- domain knowledge of business processes required to demonstrate the performance evidence.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to analyse and use big data sets
- big data sources and summaries suited to business requirement in performance evidence
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXBD405 Develop procedures for managing big data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to design and develop procedures for managing transactional and non-transactional big data in line with industry practices and organisational policies, procedures and protocols.

It applies to those in a range of industries and job roles who develop procedures that support an organisation in effectively managing its handling of big data.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy - Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan big data management procedures | 1.1 Confirm purpose and target users of big data management procedures 1.2 Review current internal practices for managing big data 1.3 Identify and document workplace issues and needs to be supported by big data management procedures |
| 2. Design procedures for managing big data | 2.1 Compare current organisational processes to industry standards for best practice in big data management to identify areas of improvement 2.2 Analyse available big data management solutions 2.3 Establish criteria for an effective big data management solution 2.4 Select appropriate big data management solution based on characteristics of big data and workplace needs |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| 3. Draft procedures for managing big data | 3.1 Draft procedures to address identified organisational needs to manage big data 3.2 Engage required stakeholders to test draft big data procedures 3.3 Integrate feedback from stakeholders into revised procedures |
| 4. Finalise developed procedures for managing big data | 4.1 Review big data management procedures against business strategies and success metrics and revise as required 4.2 Create a big data road map for implementing big data management process 4.3 Distribute final procedures to required personnel according to organisational policies and procedures 4.4 Store procedures according to established document management protocols |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to identify work requirements and seek feedback from stakeholders |
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from relevant sources to complete work |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to communicate big data management procedures |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequences the stages in developing procedures for managing big data |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to develop procedures for managing big data |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD405 Develop procedures for managing big data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop procedures for managing two different sets of big data: one transactional and one non-transactional.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to managing big data, including data protection and privacy laws and regulations
- key characteristics of big data
- organisational policies, procedures, and protocols relating to developing procedures for managing transactional and non-transactional big data, including for:
 - identifying and documenting workplace issues to be supported by big data management procedures
 - reviewing internal programs for managing big data
 - storing and retrieving big data
- industry practices relating to ethical management and governance of big data, including when making data available for big data analytics and business intelligence
- data management approaches to big data based on volume, variety and complexity of data
- protocols for database management, including open-source database management systems designed to handle big data.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to manage big data
- big data sets suited to requirement in performance evidence
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXBD406 Present big data insights

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to present insights relating to transactional and non-transactional big data in a format that is appropriate and accessible to the work area requesting it.

It applies to those who use big data analysis and presentation techniques in their day-to-day work in a broad range of industries and job roles.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to present big data insights | 1.1 Confirm business requirements for presenting big data insights 1.2 Determine context and target audience for presentation 1.3 Identify required big data relevant to business requirements |
| 2. Develop presentation of big data insights | 2.1 Create and test proof of concepts for presenting identified business solution 2.2 Identify key features and trends of captured big data in context of purpose and intended audience of presentation 2.3 Generate big data models based on key performance indicators for big data presentation 2.4 Produce interactive dashboards and other models that visualise |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | identified data insights |
| 3. Finalise presentation of big data insights | 3.1 Present big data to required stakeholders in a format that meets business needs 3.2 Seek feedback from required stakeholders on presented big data according to organisational policies and procedures 3.3 Integrate feedback into big data presentation |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Completes at times complex calculations and record numerical big data |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens when consulting with stakeholders |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements |
| Teamwork | <ul style="list-style-type: none"> Works collaboratively with interdisciplinary teams to identify captured big data sets relevant to presentation |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to report on big data capture Presents big data in a clear and logical manner |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequences the stages of presenting big data |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to present big data |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD406 Present big data insights

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- present the insights obtained from two different sets of big data using interactive dashboards and other models that serve to best visualise the insights.

One of the above sets must be transactional big data and one must be non-transactional.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- importance and benefits of big data presentation
- strategies for determining requirements for presenting big data, including analysis of business areas that need improvement
- methodology for conducting exploration and discovery of new and big data, including:
 - visualisation software to combine data from various sources to drive better business insights
 - business intelligence tools to discover and present hidden insights in data sets
- structured, semi-structured and unstructured big data visualisation tools and techniques
- organisational policies, procedures and protocols relating to presenting transactional and non-transactional big data insights, including:
 - using statistical graphs, plots, and information graphics to communicate big data insights
 - seeking feedback from stakeholders on presented big data
- in-house and external sources of big data
- appropriate methods and tools for creating and representing big data reports, including:
 - charts

- heat maps
- scatterplots
- dashboards
- interactive maps
- real-time data
- design approaches for visualising big data, including key performance indicators for the big data presentations in the performance evidence
- dashboard design principles, including audience, context and aesthetics.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment and technology required to present and visualise big data
- big data suited to business requirement in performance evidence
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXBD407 Protect big data integrity

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to protect and monitor the integrity of transactional and non-transactional big data in an organisation.

It applies to those who work in a broad range of industries and job roles who are responsible for protecting the integrity of big data when managing, storing and transferring it.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to protect integrity of big data | 1.1 Identify big data set to be protected 1.2 Review workplace governance arrangements in place for protecting the integrity of big data 1.3 Verify security of big data platform, including cloud security, according to organisational policies and procedures 1.4 Confirm security arrangements in place relating to big data secure storage and transaction logging |
| 2. Apply policies to protect big data | 2.1 Apply privacy policies to all data assets that require privacy protection 2.2 Apply security policies to all data assets that require confidentiality 2.3 Apply intellectual property policies to all data assets that contain private and confidential business information |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 3. Monitor big data integrity | 3.1 Check encryption and undertake real-time monitoring of logs to identify anomalies that arise 3.2 Identify and report malfunctioning infrastructure and any attacks on infrastructure that pose a threat to data integrity 3.3 Conduct privacy impact assessments on big data 3.4 Confirm that data protection practices comply with required standards |
| 4. Respond to breaches in big data integrity | 4.1 Identify where big data breaches have occurred according to organisational policies and procedures 4.2 Escalate data breach incidents according to organisational policies 4.3 Consult with required internal and external stakeholders and communicate breach efficiently 4.4 Audit big data breaches and report findings 4.5 Support management with post-breach and audit reviews |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Completes and manipulates at times complex calculations and records numerical data |
| Reading | <ul style="list-style-type: none"> Interprets at times complex big data and breach information |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens when consulting with stakeholders |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to complete and update audits and reports |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequences the stages of protecting the integrity of big data |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms protect to protect the integrity of big data |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD407 Protect big data integrity

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- protect the integrity of two different sets of big data in a work area: one set must be of transactional big data and one set of non-transactional big data.

During the above, the candidate must apply data protection policies and protocols.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements and standards relating to protecting the integrity of big data, including data protection and privacy laws and regulations
- organisational policies, procedures and protocols relating to protecting the integrity of transactional and non-transactional big data, including for:
 - ensuring accuracy, availability and scalability of big data
 - verifying security of big data platform
 - monitoring data discrepancies between different sources
 - monitoring big data integrity
 - identifying where big data breaches have occurred
 - ethical management and governance of big data, including consideration of ensuring a balance between availability and confidentiality of big data
- key components of workplace governance arrangements relating to protection, performance, scalability and availability of big data, including:
 - procedures for creating and maintaining inventory of big data assets
 - policies to prevent big data being used inappropriately
- protocols for dynamic and scalable access control of big data

- compliance requirements and regulations relating to big data loss
- key components of policies in place for protecting the confidential and private business information and intellectual property in big data assets:
 - privacy policies
 - security policies
 - intellectual property policies
- infrastructure security, integrity and reactive security as they relate to protecting the integrity of big data.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and telecommunications equipment required to protect the integrity of big data
- big data sets suited to requirement in performance evidence
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXBD408 Implement and review procedures for managing big data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to implement and review workplace procedures for managing transactional and non-transactional big data.

It applies to those who work in a broad range of industries and job roles who are required to make business decisions regarding big data procedures to ensure continuous improvement.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to implement procedures for managing big data | 1.1 Plan implementation strategies for selected workplace procedures for managing big data 1.2 Establish reporting mechanisms to monitor impact of implemented procedures |
| 2. Implement procedures for managing big data | 2.1 Communicate procedures to relevant stakeholders 2.2 Carry out change management initiatives to encourage adoption of procedures |
| 3. Review | 3.1 Seek feedback from required stakeholders on effectiveness and impact |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|--|
| procedures for managing big data | <p>of newly implemented procedures and continuous improvement opportunities</p> <p>3.2 Draft report on review outcomes and recommend required changes to procedures</p> <p>3.3 Seek feedback from required stakeholders on report and its recommendations according to organisational policies and procedures</p> <p>3.4 Update procedures based on stakeholder feedback and store according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical data |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to identify work requirements when consulting with stakeholders and discussing key procedural information |
| Reading | <ul style="list-style-type: none"> Identifies and interprets information from relevant sources to inform review of procedures |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to develop procedures |
| Teamwork | <ul style="list-style-type: none"> Works collaboratively with interdisciplinary teams to ensure procedures are implemented |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to facilitate procedure implementation |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD408 Implement and review procedures for managing big data

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- implement procedures for managing two different sets of big data, one of which must be transactional and one non-transactional
- review and report on effectiveness of the implemented procedures.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- organisational policies, procedures and protocols to implement and review workplace procedures for managing big data, including for:
 - communicating to and seeking feedback from required stakeholders
 - updating big data procedures
 - storing records associated with big data procedures
 - reporting on implemented procedures
- key features of strategies to implement procedures for managing big data
- techniques for stakeholder management
- trends within big data management
- change management techniques to facilitate implementation of procedures.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and data sources to inform implementation and review of procedures for managing big data

- information and telecommunications equipment required to implement and review procedures for managing big data
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXBD501 Develop big data strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to develop a big data strategy that reflects the needs and capabilities of an organisation and supports its business goals. It involves applying business processes and information relating to policy issues and new and emerging technologies during strategy development.

It applies to those who work in a broad range of industries and job roles who lead strategic approaches to big data analysis.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Data Literacy – Data Literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish business case for big data strategy | 1.1 Confirm organisational support for incorporating big data into overall business strategy 1.2 Form multi-disciplinary team to steer development of big data strategy 1.3 Identify and prioritise business needs that require big data solutions 1.4 Map available data sources to identified business needs 1.5 Determine financial value of applying big data solutions |
| 2. Develop and review proof of concept for big | 2.1 Conduct trial using big data to solve prioritised business needs 2.2 Compare proof-of-concept big data results to existing organisational data |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| data strategy | 2.3 Identify risks and benefits of scale-up of big data solution across the organisation 2.4 Document benefits and risks related to big data strategy |
| 3. Draft and consult on big data strategy | 3.1 Scope big data strategy based on relevant policy issues and new and emerging technologies and platforms 3.2 Draft big data strategy and its governance requirements in line with organisational requirements 3.3 Seek and integrate feedback on draft strategy from key stakeholders 3.4 Finalise draft strategy and distribute to required personnel |
| 4. Develop big data road map supporting business strategy | 4.1 Draft big data road map that incorporates big data policy issues 4.2 Seek and integrate feedback on draft road map according to organisational policies and procedures 4.3 Distribute and store final version big data strategy according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements for big data strategy |
| Numeracy | <ul style="list-style-type: none"> Interprets and records mathematical information Completes at times complex mathematical calculations |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to identify business requirements |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to report on big data capture and storage |
| Teamwork | <ul style="list-style-type: none"> Works collaboratively with interdisciplinary teams to gather the required information to inform and develop strategy |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequences the stages of developing big data strategy |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to develop big data strategy |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXBD501 Develop big data strategy

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop one big data strategy for a work area.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to big data strategy, including data protection and privacy laws and regulations
- organisational processes, policies, procedures and protocols to develop big data strategy, including for:
 - creating inventory of big data assets
 - seeking and integrating feedback on draft strategy
 - distributing and storing final version of big data strategy
- organisational requirements to be reflected in big data strategy:
 - key factors set out in business case
 - potential infrastructure changes required for strategy implementation
 - training requirements associated with big data strategy
 - financial impact of big data strategy
- key components of big data strategies, including requirement to ensure:
 - balance between availability and confidentiality of big data
 - support for a highly available big data management system with fault-tolerant failover services
- factors to be reflected in big data strategies, including:
 - big data policy issues relating to security, intellectual property, governance and privacy
 - new and emerging technologies and platforms of relevance to strategies.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment that uses big data.

Access is required to:

- information and data sources to inform development of big data strategy, including business strategy documents
- information and telecommunications equipment required to develop big data strategy
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXCM301 Engage in workplace communication

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Version created to clarify knowledge evidence |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to communicate (through written, oral and nonverbal form) in the workplace within an industry.

This unit applies to a wide range of workers, but has a specific focus on the communication skills required for workers with limited responsibility for others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|---|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Plan workplace communication | 1.1 Establish audience and purpose of workplace communication 1.2 Identify information needs and communication requirements of intended recipients of workplace communication 1.3 Establish methods of communication available to convey message or information based on work context |

| | |
|---|---|
| | <p>1.4 Select appropriate method(s) of communication to convey messages or information</p> <p>1.5 Plan content of message or communication</p> |
| 2. Undertake routine communication | <p>2.1 Communicate message or information according to organisational requirements and in a manner that is respectful and clear in meaning</p> <p>2.2 Adjust communication methods to enable effective communication with those from diverse backgrounds as required</p> <p>2.3 Receive workplace information and instructions, and interpret and clarify as needed</p> <p>2.4 Respond to communications according to requirements of the message</p> <p>2.5 Identify and report any communication challenges to appropriate person</p> |
| 3. Participate in workplace communication | <p>3.1 Clearly contribute ideas and information to workplace discussions</p> <p>3.2 Support others to communicate in workplace discussions through courteous and professional behaviour</p> <p>3.3 Use active listening and questioning techniques to clarify issues in a group situation</p> <p>3.4 Seek feedback from others on effectiveness of communication</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Navigate the world of work | <ul style="list-style-type: none"> Understands nature and purpose of own role and associated responsibilities and how it contributes to organisational goals and outcomes |
| Get the work done | <ul style="list-style-type: none"> Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement Uses digital technology to find, record or communicate basic information |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXCM301 Engage in workplace communication

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Version created to clarify knowledge evidence |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including on at least one occasion, evidence of the ability to:

- identify the most appropriate method of communication for the intended audience
- prepare written material that is clear in meaning and format according to organisational requirements
- demonstrate active listening and questioning techniques in a workplace discussion
- communicate information and ideas verbally in a workplace discussion, considering the needs of those from diverse backgrounds
- identify and report any communication challenges to superiors
- seek feedback from others on effectiveness of communication
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- legislative requirements relevant to workplace communication
- organisational requirements relevant to workplace communication (including digital form):
 - ethical behaviour guidelines from state or federal governments
 - workplace policies
 - codes of conduct
 - organisational reputation and culture
- techniques to resolve communication challenges

- methods and techniques to participate in workplace discussions, including active listening, questioning and providing feedback
- key principles of cross-cultural communication and communication with individuals with special needs or disabilities
- communication methods suited to audience and workplace requirement:
 - verbal means: telephones, mobile devices, video conference
 - written means: email, SMS, social media
 - Internet of Things (IoT)
- communication challenges relevant to performance evidence:
 - conflicts with clients or team members
 - potential risks or safety hazards
 - unethical or inappropriate communication
- key relevant features of:
 - different communication styles
 - different communication methods
 - relevant cross cultural communication techniques.

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXCM401 Apply communication strategies in the workplace

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Version created to clarify knowledge evidence |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to facilitate and apply communication strategies in the workplace within any industry.

This unit has a specific focus on the communication skills required for supervisor level workers with responsibility for other workers.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|---|--|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Prepare for communication | 1.1 Identify work activities requiring communication 1.2 Establish communication requirements for identified work activities 1.3 Identify communication roles for self and others to complete activity |

| Elements | Performance Criteria |
|---|---|
| | 1.4 Seek assistance or clarification regarding communication objectives as required 1.5 Select appropriate method of communicating information internally and externally based on organisational requirements |
| 2. Use communication strategies to provide work instruction | 2.1 Use appropriate presentation methods to communicate information or instruction based on the requirements of audience 2.2 Use appropriate method of communication to communicate information or instruction based on the requirements of audience 2.3 Negotiate expected work requirements with others and clarify that instructions have been understood |
| 3. Facilitate workplace communication | 3.1 Use interpersonal skills to build relationships with team members and clients and facilitate respectful interaction 3.2 Facilitate respectful communication amongst others, considering the needs of those from diverse backgrounds 3.3 Use problem solving and decision making skills to resolve any communication challenges 3.4 Obtain confirmation on outcomes of communication challenges to ensure issues have been resolved |
| 4. Monitor and support team communication | 4.1 Ensure all communication is consistent with legislative and organisational requirements 4.2 Provide performance feedback and additional support to others when required 4.3 Seek feedback and assistance from others to improve own communication techniques 4.4 Collate and report any important information and unresolved issues to relevant superiors |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------|-------------|
|-------|-------------|

| Skill | Description |
|----------------------------|---|
| Writing | <ul style="list-style-type: none">Develops written texts using appropriate grammar, spelling and punctuation in relevant organisational formats |
| Navigate the world of work | <ul style="list-style-type: none">Understands responsibilities and complies with legislative, regulatory and organisational requirements |
| Get the work done | <ul style="list-style-type: none">Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvementUses digital technology to find, record or communicate basic information |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXCM401 Apply communication strategies in the workplace

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Version created to clarify knowledge evidence |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including evidence of the ability to:

- identify the communication requirements for a work activity and assign roles to others to fulfil those requirements
- select appropriate communication method for relevant audience and according to organisational requirements
- articulate to others their roles in fulfilling the communication requirements and negotiate roles in response to feedback
- present and convey information to others in a way that they can understand and demonstrate that the needs of all recipients, including those from diverse backgrounds have been considered
- demonstrate problem solving techniques to negotiate and resolve communication challenges
- evaluate the communication process and identify areas for improvement, reporting to relevant supervisors as required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- legislative requirements relevant to workplace communication
- organisational requirements relevant to workplace communication (including digital form):
 - policies and protocols
 - codes of conduct

- organisational reputation and culture
- techniques to resolve communication challenges
- methods and techniques to participate in workplace discussions, including active listening, questioning and providing feedback
- key principles of cross-cultural communication and communication with individuals with special needs or disabilities
- presentation methods to present and convey workplace information or instructions:
 - formal presentation using visual aids and prompts
 - informal team meeting or instructional briefing
 - written work instruction for a process or procedure
- communication methods suited to audience and workplace requirement:
 - verbal means: telephones, mobiles, video conference
 - written means: emails, SMS, social media
- communication challenges relevant to performance evidence:
 - conflicts with clients or team members
 - potential risks or safety hazards
 - unethical or inappropriate communication
 - use of visual prompts and presentations
 - communication that falls outside of workplace policy
- key relevant features of:
 - different communication styles
 - different communication methods
 - cross cultural communication techniques.

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXCM501 Lead communication in the workplace

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Version created to clarify knowledge evidence |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to lead communication in the workplace within any industry.

This unit has a specific focus on the communication skills required for team leaders with responsibility for other workers.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|---|--|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Establish communication protocols | 1.1 Analyse internal and external information needs relevant to workplace 1.2 Develop or structure communication protocol(s) to meet organisational information needs and goals 1.3 Identify ways to adapt communication protocols to suit various |

| | |
|---------------------------------------|--|
| | <p>contexts</p> <p>1.4 Prepare materials to support and/or implement communication protocols</p> |
| 2. Coordinate effective communication | <p>2.1 Direct others to communicate according to organisational requirements and goals</p> <p>2.2 Explain complex information to positively influence others</p> <p>2.3 Motivate others to communicate respectfully, considering the needs of all, including those from diverse backgrounds</p> <p>2.4 Identify and address any communication challenges to remove barriers to understanding</p> |
| 3. Present and negotiate persuasively | <p>3.1 Identify and use a variety of communication styles relevant to varying audiences</p> <p>3.2 Present information in a succinct, clear and persuasive manner</p> <p>3.3 Evaluate differences in perspective and critically examine outcomes</p> <p>3.4 Negotiate towards a final outcome with a focus on key outcomes</p> <p>3.5 Confirm and implement outcomes of negotiation or communication using appropriate methods</p> |
| 4. Review communication practices | <p>4.1 Provide mentoring to others to assist them in achieving communication goals</p> <p>4.2 Obtain feedback from a variety of sources to manage the outcomes of communications and negotiations</p> <p>4.3 Identify and document areas for improvement in communication for team or organisational practices</p> <p>4.4 Implement plans to improve communication processes</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------|---|
| Writing | <ul style="list-style-type: none"> Utilises sophisticated writing skills to summarise information from various sources and distinguish significant information from minor references |
| Navigate the | <ul style="list-style-type: none"> Seeks to improve organisational policies and procedures to better meet organisational goals |

| Skill | Description |
|-------------------|--|
| world of work | |
| Get the work done | <ul style="list-style-type: none">• Evaluates effectiveness of communication channels, systems and processes to inform decisions and implement improvements• Uses digital technology to find, record or communicate basic information |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXCM501 Lead communication in the workplace

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Version created to clarify knowledge evidence |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and range of conditions of this unit, including on at least occasion, evidence of the ability to:

- collate research on internal and external communication needs
- develop and implement communication protocols in accordance with organisational requirements
- present information in a persuasive and professional manner
- apply negotiation techniques to reach desired outcomes
- address communication challenges for continuous improvement.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- legislative requirements relevant to workplace communication
- organisational requirements relevant to workplace communication (including digital form):
 - workplace policies
 - codes of conduct
 - organisational reputation and culture
- techniques to resolve communication challenges
- methods to mentor and coach others
- key principles of cross-cultural communication and communication with individuals with special needs or disabilities

- communication protocols relevant to organisational information needs:
 - internal and external communication guides
 - risk based/emergency communication guides
 - style/formatting of communication guides
 - processes for allocation of responsibilities for standard communication
- communication challenges relevant to performance evidence:
 - conflicts with clients or team members
 - potential risks or safety hazards
 - unethical or inappropriate communication
 - appropriately framing organisational messaging
- key relevant features of:
 - different communication styles
 - different communication methods
 - relevant cross cultural communication techniques
 - negotiation and conflict resolution techniques.

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXCS301 Protect own personal online profile from cyber security threats

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to protect own personal online profile from cyber security threats, and to limit the potential impact of online security breaches.

It applies to those working in a broad range of industries and job roles under some supervision and guidance, who protect their own online profile so that it is cyber secure.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify existing and potential security threats to own personal online profile | 1.1 Determine all current online accounts and profiles 1.2 Identify common threats to security of online profiles 1.3 Identify industry-specific risk factors that raise risk levels to own personal profile |
| 2. Audit own personal online profile for identified security threats | 2.1 Review all online accounts, associated applications and browsers at risk of identified threats according to organisational policies and procedures 2.2 Review public online profiles that can be linked to own personal identity 2.3 Check billing and account records carefully to detect |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | <p>early indicators of potential theft</p> <p>2.4 Report identified suspicious cyber activity according to cyber security legislative requirements and organisational policies and procedures</p> |
| 3. Address identified existing and potential security threats to own personal online profile | <p>3.1 Secure personal online profile and remove potential security risks</p> <p>3.2 Confirm that software used on own desktop/laptop and mobile devices is current and sufficient</p> <p>3.3 Remove potentially sensitive personal and company information according to organisational policies and procedures</p> <p>3.4 Create strong passwords across personal and work accounts</p> <p>3.5 Turn on two factor authentication across all accounts where available</p> <p>3.6 Adjust privacy/security settings on internet browser, web applications and applicable online accounts</p> <p>3.7 Delete all unused online accounts/applications according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-----------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations relating to cyber security |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to assist with protecting online profile from cyber security threats |
| Problem solving | <ul style="list-style-type: none"> Uses problem solving skills to understand the nature of potential threat to personal profile or device and to undertake required action |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXCS301 Protect own personal online profile from cyber security threats

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- conduct one audit of own personal online profile and identify existing and potential cyber security threats
- identify and address three potential cyber security risks to own personal online profile.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to reporting cyber security threats
- organisational policies and procedures relating to online profiles, including escalation routes for cyber security issues
- basic principles of cyber security, including:
 - importance of data confidentiality, integrity and availability
 - common cyber security terms
 - common cyber security threats that individuals might be exposed to online
 - secure internet browsing
- risk factors relating to own personal online profile, including:
 - password management practices:
 - strength of created passwords
 - number of passwords used for multiple accounts
 - frequency of change to passwords
 - own work role within organisation
 - regular tasks in own work that raise personal risk level, including internet browsing
 - potential targets for cyber attack in own direct professional network
 - protocols for handling personally identifiable information

- physical safety of devices
- industry-specific risk factors and their risk to online profiles
- common strategies, tools and techniques for improving security of own personal online profile, including for:
 - password protection
 - secure password management and account replicating and splitting
 - fundamentals of two-factor authentication
 - billing and account privacy settings
 - software patching
 - connecting to public Wi-Fi via virtual private networks (VPNs)
- common methods and practices for:
 - responding to cyber security issues, including reporting protocols
 - secure internet browsing, including banking and email
- common cyber security threats that individuals and data might be exposed to, including:
 - phishing
 - social engineering
 - social media
 - malware
 - physical threats, including data loss due to working insecurely in public spaces.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXCS302 Identify and report online security threats

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to identify and report online security threats to limit potential impact of cyber security breaches.

It applies to those working in a broad range of industries and job roles under some supervision and guidance who encounter and report online threats during the course of their work.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify online security threats | 1.1 Review internal policies, procedures and plans relating potential online security breaches 1.2 Identify features of common types of potentially fraudulent communications 1.3 Implement techniques to verify suspicious requests for information |
| 2. Respond to an online security breach | 2.1 Block and report potential security breaches on computer and mobile device according to organisational policies and procedures 2.2 Respond to actual security breach or cyber security incident according to organisational response plan 2.3 Report security breach or cyber security incident according to |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|---|
| | legislative requirements and organisational policies and procedures |
| 3. Support post- breach review | 3.1 Provide information to required personnel to assist in documenting potential and actual breaches 3.2 Support post-incident review and identifying lessons learnt 3.3 Contribute updates to cyber security incident response plan as required and within scope of own role |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to ensure that concepts regarding cyber security are well understood |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations relating to cyber security |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology relating to cyber security for breach and incident reports |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to share information within the organisation relating to potential online security threats |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXCS302 Identify and report online security threats

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify and report three different online security threats in a work area.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to identifying and reporting online security threats, including:
 - data protection
 - implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws
 - established international legislation
- organisational policies and procedures relating to online information security breaches, including:
 - blocking and reporting potential security breaches
 - escalation routes for cyber security issues
- common types of online scams and security risks, including phishing scams
- common techniques of phishing and spear phishing used by attackers, including:
 - spam email and SMS text
 - social engineering, including telephone calls, social media and website requests for information
- basic principles of cyber security
- indicators of insecure connection to websites, in particular where data is being collected
- Australian government sources of information on current online security threats
- common online security threats to which individuals might be exposed to, including physical threats

- common procedures for:
 - mitigating online security threats
 - following organisational cyber security incident response plan
 - responding to cyber security breaches.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXCS303 Securely manage personally identifiable information and workplace information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to securely manage personally identifiable information (PII) and workplace information.

It applies to those working in a broad range of industries and job roles under some supervision and guidance who manage large amounts of PII and workplace information.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Handle PII and workplace information responsibly | 1.1 Review current standards, practices and procedures relating to workplace information 1.2 Identify sensitive data in own workplace environment according to organisational policies and procedures and within scope of own role 1.3 Classify workplace information types according to organisational procedures 1.4 Apply privacy policies to all data devices that require confidentiality |
| 2. Store and share PII and workplace information | 2.1 Organise obtained data sets in an easily retrievable format 2.2 Implement required access control protocols for identified |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| securely | <p>sensitive data</p> <p>2.3 Confirm that data is accurate, up-to-date, and comprehensive</p> <p>2.4 Identify and report malfunctioning infrastructure and attacks on infrastructure that pose a threat to data integrity</p> |
| 3. Apply information protection protocols | <p>3.1 Conduct back-up of on-site and off-site data according to organisational policies and procedures</p> <p>3.2 Conduct privacy impact assessments on data</p> <p>3.3 Confirm adherence to data protection compliance standards</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Interprets mathematical data |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to clarify consultations |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements |
| Planning and organising | <ul style="list-style-type: none"> Efficiently and logically sequence the stages of data management |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to assist with data storage, data retrieval and data management |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXCS303 Securely manage personally identifiable information and workplace information

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use data protection techniques to manage workplace information for one work area over the life of a small project or work cycle.

In the course of the above, the candidate must store and share personally identifiable information (PII) in a secure manner.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to securely managing PII and workplace information, including:
 - data protection
 - implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws
 - established international legislation
- organisational policies and procedures relating to:
 - identifying sensitive data
 - securely storing, sharing and managing customer information
 - encryption, and protocols for its uses
 - data classification
 - media and document labelling
 - monitoring and reporting faults and malfunctions in IT infrastructure
- industry best practice and Australian government sources of information relating to access control, including:

- password protection
- storage locations
- securely sharing
- data deletion
- risks and benefits of cloud storage
- risks of communicating sensitive information via non-secure means e.g. email and SMS
- framework for distributed storage
- technologies, techniques and protocols for storing and retrieving data
- data protection protocols and industry-standard compliance standards relating to:
 - back-up
 - data sharing
 - data storage
 - disposal of sensitive information
 - privacy impact assessments.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXCS401 Maintain security of digital devices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required ensure the cyber security of digital devices.

It applies to those working in a broad range of industries who as part of their job role ensure the security of digital devices used.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify appropriate security for digital devices | 1.1 Create and maintain register of digital devices on organisation's network 1.2 Confirm what information is held on the registered devices 1.3 Categorise level of risk associated with each device based on sensitivity of information stored 1.4 Select required security protocol to manage level of risk associated with each device |
| 2. Apply protection strategies to digital devices | 2.1 Install and run latest anti-malware on each device 2.2 Create strong passwords across personal and work accounts 2.3 Switch on two-factor authentication where available |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 2.4 Encrypt devices according to instructions 2.5 Develop associated physical security plan and communicate this to whole organisation |
| 3. Evaluate effectiveness of applied protection strategies | 3.1 Review number of breaches and business impact over review period 3.2 Monitor latest developments in digital security 3.3 Support organisation to select most appropriate security strategies |
| 4. Patch software across multiple devices | 4.1 Apply updates to software and applications across own desktop and mobile devices 4.2 Ensure that new devices are updated and configured correctly as part of initial start-up procedure |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Interprets mathematical data Completes at times complex calculations and records mathematical data |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations relating to cyber security |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to assist with protection strategies relating to cyber security |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXCS401 Maintain security of digital devices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use best practice protection strategies to maintain the security of two different electronic devices over the life of a small project or work cycle
- conduct gap analysis to evaluate effectiveness of all applied best practice strategies.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- external party security risks and methods for mitigating risk
- industry-accepted best practice protection strategies for improving security on digital devices:
 - password management
 - use of anti-virus software
 - virtual private network (VPN) use on public Wi-Fi
 - router settings
 - fundamentals of two-factor authentication
 - encryption
 - patching software applications
- risk management methodologies
- tools and techniques to conduct gap analysis of strategy performance
- data protection requirements for:
 - stored data
 - data in transit
 - data in third party applications
- mobile device security strategies.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXCS402 Promote workplace cyber security awareness and best practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to promote cyber security in a work area.

It applies to those working in a broad range of industries who as part of their job role support policies, procedures and practice within an organisation that promote cyber security.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Develop cyber security awareness in work area | 1.1 Establish current level of awareness in work area relating to cyber security 1.2 Create and maintain cyber security awareness program that reflects organisation-wide best practice 1.3 Contribute to developing cyber security policies and procedures, and communicate to required personnel |
| 2. Support effective cyber security practices in work area | 2.1 Review cyber security practices according to organisational policies and procedures 2.2 Arrange training and information updates as required, and maintain related records 2.3 Present insights from review and training to required |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | personnel, and potential related impacts on workplace |
| 3. Review cyber security awareness in work area | <p>3.1 Review latest cyber security threats and trends impacting organisations</p> <p>3.2 Document outcomes of review and suggested improvements for consideration by required personnel</p> <p>3.3 Communicate review outcomes and cyber security improvement requirements according to organisational policies and procedures</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Learning | <ul style="list-style-type: none">Modifies behaviour following exposure to new informationShares insights gained from cyber security trend analysis |
| Oral communication | <ul style="list-style-type: none">Consults with stakeholders to inform decision making |
| Reading | <ul style="list-style-type: none">Interprets information from relevant sources to determine organisational expectations |
| Writing | <ul style="list-style-type: none">Uses clear, specific and industry-related terminology relating to cyber security in workplace documents |
| Planning and organising | <ul style="list-style-type: none">Maintains records and documentation relating to cyber security protection |
| Teamwork | <ul style="list-style-type: none">Works collaboratively with interdisciplinary teams to promote cyber security |
| Technology | <ul style="list-style-type: none">Uses appropriate technology platforms to assist with promoting cyber security within work area |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXCS402 Promote workplace cyber security awareness and best practices

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop one set of policies and procedures for a work area that promote cyber security awareness and practices
- arrange training or updates to be provided to colleagues that support practice or awareness in relation to two different cyber security matters.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to cyber security context of performance evidence, including:
 - data protection
 - implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws
 - established international legislation
- organisational policies and procedures relating to:
 - securely storing, sharing and managing information
 - encryption, and protocols for its uses
 - data classification and management
 - media/document labelling
 - data governance
 - acceptable use
 - bring your own device
- Australian government sources of information on current threats
- risks associated with workplace cyber security
- strategies and techniques for promoting workplace cyber security

- techniques for:
 - implementing and promoting workplace cyber security awareness
 - facilitating training that promotes cyber security awareness, including the use of simulated activities.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXCS403 Contribute to cyber security threat assessments

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to support maintaining a cyber secure network through identifying cyber security threats for an organisation.

It applies to those working in a broad range of industries who as part of their job role contribute to assessments of level of risk relating to real and potential cyber security breaches.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to reviewing workplace cyber security threats | 1.1 Identify relevant organisational data security/protection policies and procedures 1.2 Contribute to organisation-wide cyber security audits 1.3 Contribute to identifying threats to workplace security of cyber security threats |
| 2. Assist in assessing risks and potential business impact of cyber security threats | 2.1 Assist in assessing cyber security risks and their likelihood, consequences and suggested mitigation strategies 2.2 Assist in reviewing industry level threats and best practice cyber security strategies 2.3 Assign risk levels for identified cyber risks based |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | on measurement scale 2.4 Contribute to identifying impact of risks |
| 3. Finalise cyber security threat assessment | 3.1 Document impact findings that include recommendations for required responses to control risks 3.2 Support the communication of cyber security threat assessment outcomes and recommendations to required personnel 3.3 Seek feedback as required on assessment findings 3.4 Assist in integrating feedback to finalise threat assessment 3.5 Distribute or store final threat assessment according to organisational policies and procedures |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Interprets mathematical data Completes at times complex calculations and records mathematical data |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to clarify consultations Communicate findings of assessment of business impact to required personnel |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology relating to cyber security Produces written reports on business impact of assessed threat |
| Teamwork | <ul style="list-style-type: none"> Works collaboratively with interdisciplinary teams to ensure procedures are implemented |
| Technology | <ul style="list-style-type: none"> Uses appropriate technology platforms to assist with cyber security threat assessments |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXCS403 Contribute to cyber security threat assessments

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- provide non-technical support to a cyber security threat assessment in a work area by describing three threats
- communicate and distribute findings of the identified threats.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to contributing to cyber security threat assessments, including:
 - data protection
 - implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws
 - established international legislation
- potential organisational impact of cyber attacks
- online risks affecting organisation's operations
- common procedures for cyber threat rating and modelling
- strategies, techniques and tools that improve an organisation's cyber security and audit processes
- organisational policies and procedures for information security, including:
 - confidentiality, integrity, and availability
 - communicating threat assessment findings.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards and organisational procedures required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXCS404 Contribute to cyber security risk management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to contribute to cyber security risk management, which includes assisting in developing and managing associated risk management strategies.

It applies to those working in a broad range of industries and job roles who work alongside technical experts to develop cyber security risk-management strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Contribute to recommending risk management strategies that mitigate cyber security risk | <ul style="list-style-type: none">1.1 Consult with stakeholders to determine scope of risk management appropriate to organisation and industry1.2 Review relevant critical cyber risk management strategies appropriate to level of risk1.3 Assist in developing suitable cyber security response options according to organisational policies and procedures1.4 Present options for risk management strategies for approval within scope of own role1.5 Document approved risk management strategies |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| 2. Support implementation of approved risk management strategies in response to risk | 2.1 Support communication of approved risk management strategies to required personnel 2.2 Contribute to monitoring cyber security risk according to selected risk management strategies 2.3 Assist in determining compliance with implemented cyber risk mitigation strategies 2.4 Address non-compliance within scope of own role and escalate where required according to organisational policies and procedures 2.5 Assist in establishing feedback processes that provide warning of potential new risks according to organisational requirements |
| 3. Review and revise implemented risk management strategies | 3.1 Identify benchmarks to track effectiveness of risk management strategies 3.2 Support evaluation of effectiveness of implemented strategies 3.3 Update risk management strategies with new information as required |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information |
| Numeracy | <ul style="list-style-type: none"> Interprets mathematical data |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probing questions and actively listens to clarify consultations Communicate proposed risk management strategies to required personnel |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology relating to cyber security Maintains and updates a range of documents, including risk registers and incident response plans |
| Planning and | <ul style="list-style-type: none"> Manages incident response plans |

| Skill | Description |
|------------|---|
| organising | |
| Teamwork | <ul style="list-style-type: none">• Works collaboratively with interdisciplinary teams develop cyber risk management strategies |
| Technology | <ul style="list-style-type: none">• Uses appropriate technology platforms to assist with cyber security risk management |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXCS404 Contribute to cyber security risk management

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- contribute to developing and implementing risk management strategies that control two different identified cyber security risks and document the response option applied to each risk
- support evaluation of effectiveness of each implemented strategy.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative and regulatory requirements relating to contributing to cyber security risk management, including:
 - data protection legislation
 - notifiable data breach legislation
 - Australian privacy laws
 - established international legislation
- key risk management strategies, including:
 - regular organisational training
 - regular threat assessment
 - cyber security incident response plan
 - clear escalation routes
- organisational policies and procedures, including for:
 - analysing and reviewing risk management methodologies
 - developing communications plans
 - evaluating effectiveness of risk management strategies
 - monitoring cyber risk

- reviewing currency of risk register
- industry-specific knowledge of suitable procedures for applying risk management strategy
- guidelines required for updating technology
- business process design principles in relation to risk management
- reporting mechanisms for tracking organisational cyber security maturity.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXCS405 Contribute to cyber security incident responses

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Application

This unit describes the skills and knowledge required to assist in responding to and containing cyber security incidents.

It applies to those working in a broad range of industries and job roles who work alongside technical experts to develop cyber security risk-management strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Competence – Cyber Security

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Confirm cyber security incident and contribute to its containment | 1.1 Confirm nature and location of cyber security incident according to organisational policies and procedures 1.2 Estimate risk, likelihood and potential consequence of incident according to organisational response procedures 1.3 Assist in ensuring that cyber incident is contained according to legislative requirements and organisational cyber security incident response plan 1.4 Assist in confirming no further risks according to legislative requirements and organisational response procedures |
| 2. Communicate information on cyber security incident | 2.1 Escalate cyber security incident with required workplace personnel according to organisational policies and |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>procedures</p> <p>2.2 Consult with required internal and external stakeholders on communication needs relating to cyber security incident</p> <p>2.3 Assist in alerting required external parties according to legislative requirements and organisational procedures</p> |
| 3. Contribute to post-incident activities | <p>3.1 Support post-breach review and reporting</p> <p>3.2 Assist in identifying lessons learnt from incident response and recommended changes to cyber security response plan</p> <p>3.3 Assist in updating cyber security response plan to reflect review outcomes according to organisational policies and procedures</p> <p>3.4 Communicate lessons learnt and recommendations to required personnel</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Learning | <ul style="list-style-type: none"> Modifies behaviour following exposure to new information Understands developments within cyber security protection and is able to advise on which options are appropriate |
| Numeracy | <ul style="list-style-type: none"> Interprets mathematical data Completes at times complex calculations and records mathematical data |
| Oral communication | <ul style="list-style-type: none"> Asks open and closed probe questions and actively listens to clarify consult with business and ICT technicians Communicate findings of assessment of business impact to required personnel |
| Reading | <ul style="list-style-type: none"> Recognises and interprets information from relevant sources to determine organisational expectations and legal requirements |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology relating to cyber security Produce written reports on business impact of assessed threat |
| Planning and organising | <ul style="list-style-type: none"> Manages cyber security incident response plan including protection strategies through to responding to breaches |

| Skill | Description |
|------------|--|
| Technology | <ul style="list-style-type: none">Uses appropriate technology platforms to assist with cyber security incident responses |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for BSBXCS405 Contribute to cyber security incident responses

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to assist in:

- responding to two different cyber security incidents in a work area
- conducting one post-breach review.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to contributing to cyber security incident responses, including:
 - data protection
 - implications of notifiable data breach legislation on an organisation and other associated Australian privacy laws
 - established international legislation
- procedures for developing communications plans
- organisational policies and procedures relating to cyber security incident response, including procedures for:
 - confirming nature and location of incidents
 - determining risk, likelihood, and consequence of incidents
 - containing incidents
 - notifying internal and external stakeholders of incident
 - internal and external communications
 - conducting post-breach reviews
- reporting methods for cyber security incidents, including official government channels
- key features of cyber security incident response plan
- risk mitigation strategies and procedures relating to cyber security

- internal and external stakeholders involved in responding to cyber security incidents.

Assessment Conditions

Skills must be assessed in a workplace or simulated environment where conditions are typical of a work environment requiring cyber secure practices, processes and procedures.

Access is required to:

- information and data sources relating to cyber security
- device with active internet connection
- internet browser
- industry standards, organisational procedures, and legislative requirements required to demonstrate the performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

BSBXDB301 Respond to the service needs of customers and clients with disability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to appropriately respond to the individual needs of customers or clients with disability, to maximise equal access to provided products or services.

This unit applies to front line personnel in service providers who interact with customers or clients with disabilities. Those undertaking this unit would work autonomously in a range of contexts whilst performing specific tasks, with supervisors available as an escalation point, if required.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|--|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Determine service requirements for customer or client with disability | <p>1.1 Confirm that communication method and form of interaction meet the capabilities, needs and preferences of individual customers or clients</p> <p>1.2 Communicate with customer or client to determine the reason for the service interaction</p> |

| | |
|---|---|
| | 1.3 Consult customers or clients to confirm if they have a requirement or preference for additional personal support within the service context |
| 2. Confirm whether customer or client needs can be met through service provided | <p>2.1 Determine whether customer or clients' service and support needs are within the scope of own role and responsibilities, and confirm with supervisor</p> <p>2.2 Identify where reference to other service providers is required where customer or client support needs or preferences are beyond the scope of own role</p> |
| 3. Provide service to customers or clients with disability | <p>3.1 Inform customers or clients about the products, services or supports that are accessible to them, and how they can be used or navigated</p> <p>3.2 Identify and access available supports, facilities or resources within scope of own role and according to organisational procedures, as required to service individual customers or clients</p> <p>3.3 Seek feedback on whether customers or clients are satisfied with the service received and that their service needs have been addressed</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Accesses, reads and interprets information related to resources and supports available |
| Communication | <ul style="list-style-type: none"> Discusses and seeks information using appropriate structure and language for the particular audience Exchanges information through questions and responses to clarify or confirm understanding Engages with others clearly, using appropriate language and pace suitable to audience and environment |
| Navigate the world of work | <ul style="list-style-type: none"> Complies with organisational protocols, policies and procedures relevant to own role Understands nature and purpose of own role and associated responsibilities and how it contributed to organisational goals and outcomes |

| Skill | Description |
|----------------------|---|
| Interact with others | <ul style="list-style-type: none">• Selects and uses appropriate communication techniques in response to differences in customer or client profile• Establishes connections and shares information with others who can contribute to effective work outcomes |
| Get the work done | <ul style="list-style-type: none">• Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXDB301 Respond to the service needs of customers and clients with disability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including evidence of the ability to:

- interact with a minimum of three different individual customers or clients with disability in compliance with organisational diversity and inclusion objectives and policies, codes of practice and behavioural guidelines and:
 - adjust communication styles within the service context, using verbal and nonverbal techniques to accommodate the individual capabilities, needs and preferences of customers or clients
 - interact through the use of assistive communication devices as directed by individual customers, support persons or specialist support providers
 - implement a person-centred service approach that focuses on individual customer or clients' expressions of their needs and preferences
 - provide support and access resources and services to address the needs of customers or clients within scope of own role and escalate to supervisor where required
 - refer to additional service providers to meet more complex individual customer or client needs
 - seek feedback on customer/client satisfaction with service.

Throughout this process, interaction with an individual's support person should only be undertaken as required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- organisational policies, codes of practice and/or behavioural guidelines for:
 - interacting with customers or clients with disability
 - maintaining confidentiality, privacy and dignity for customers and clients

- responding to customers and clients disclosing and/or sharing information about disability
- persons covered by the Disability Discrimination Act
- features of the social model of disability as compared to the medical model
- where barriers to access and communication within service contexts exist
- different communication methods and techniques that can be employed when interacting with customers or clients, including:
 - use of plain English in spoken and written communication
 - at least one other verbal and one other nonverbal communication method
 - at least two augmentative and alternative communication techniques appropriate to the service context and purpose of interaction
- inclusive language and person-first expressions to use when communicating with, or about, customers or clients with disability
- supports, services, resources, facilities and aids that can be accessed and utilised to meet individual customer or client needs
- principles and strategies of a person centred support approach
- additional disability support and service providers that can be referred to, to meet more complex individual customer or client needs.

Assessment Conditions

The following conditions must be met for this unit:

Use of facilities, equipment and resources, including:

- a customer or client base or a simulated setting (where a workplace situation would be impractical, inappropriate or not possible), consisting of contact with a minimum of three individuals with differing disabilities
- workplace diversity and service policies and codes of practice
- organisational guidelines and codes of practice for provision of service to customers or clients with disability
- organisational products, services and/or supports

Industry operating conditions, including:

- challenges typical in work to support customers or clients with disability
- a minimum of three opportunities for real service interactions with customers or clients, either face to face or through other formats for service interaction, such as telephone and email.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards to AC.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXDB401 Develop and implement recruitment processes that are inclusive of people with disability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to develop and implement recruitment processes in accordance with regulatory and workplace requirements, to ensure a workforce that is inclusive of people with disability. It involves developing capabilities to ensure hiring processes are accessible to candidates with differing disabilities, and that hiring outcomes promote workplace inclusion and diversity objectives.

This unit applies to human resources staff and hiring managers, as well as broader management within workplaces across various industries, who are responsible for determining hiring requirements, structuring jobs and assessing applicants.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|---|--|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Determine job requirements | 1.1 Consult with relevant management personnel to determine workplace recruitment needs and position requirements 1.2 Prepare job descriptions, capability and task specifications that |

| | |
|---|---|
| | <p>accurately reflect inherent role requirements and workplace needs</p> <p>1.3 Develop selection criteria that reflect job specifications and support opportunities for candidates with disability</p> |
| 2. Establish accessible application processes | <p>2.1 Choose alternative formats, channels and technologies for advertising vacancies that promote applications from talent pools including people with disability</p> <p>2.2 Test accessibility of application processes and platforms to ensure all candidates are able to submit applications</p> |
| 3. Undertake inclusive interview processes | <p>3.1 Design an interview guide and questions that can be presented in various formats, which reflect job role requirements and anti-discrimination standards</p> <p>3.2 Confirm the format, method of communication and environment through which interview will be undertaken, and outline alternative options to assist with meeting individual applicant needs and preferences</p> <p>3.3 Consult applicants on their individual communication and support needs, and identify any modifications, reasonable adjustments or alternative communication strategies to be implemented to assist them through the hiring process</p> <p>3.4 Conduct accessible interviews, through formats and techniques that match identified applicant needs</p> <p>3.5 Test the accessibility of any other assessment and selection tools used, and confirm that candidates are able to use them, or have available alternatives, to demonstrate their skills and capabilities</p> |
| 4. Conclude recruitment process | <p>4.1 Assess and select candidates equitably and objectively using selection criteria</p> <p>4.2 Seek feedback from applicants on accessibility of recruitment process and implementation of any adjustments</p> <p>4.3 Seek feedback from manager of successful candidate on appropriateness of match to job specifications, to inform improvements for future recruitment processes</p> <p>4.4 Make recommendations to management responsible for workplace policies and practices to improve inclusive recruitment of people with disability</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none">Identifies and analyses complex texts to determine legislative, regulatory and business requirementsAnalyses and evaluates a range of textual information to determine staff requirements of the workplace, and suitability of candidates |
| Writing | <ul style="list-style-type: none">Researches and develops documents that communicate effectively, maximising the potential to attract suitable candidates, and developed within applicable organisational and legislative requirementsCreates texts using formats and language appropriate to the audience and context |
| Communication | <ul style="list-style-type: none">Presents information and seeks advice using appropriate structure and language for the particular audienceParticipates in discussions using questions and responses to elicit the view of others and to clarify or confirm understanding |
| Navigate the world of work | <ul style="list-style-type: none">Recognises and adheres to legislative requirements, workplace protocols, policies and procedures associated with the hiring processDevelops and reviews workplace policies and procedures in accordance with legal and workplace requirements |
| Interact with others | <ul style="list-style-type: none">Uses inclusive and collaborative techniques to seek feedback and support, and consult with a range of stakeholdersSelects and uses appropriate protocols when communicating with internal stakeholders, as well as candidates, to seek or share information |
| Get the work done | <ul style="list-style-type: none">Plans and organises workload, information and hiring that ensures compliance with workplace policies, procedures and legislative requirementsUses problem-solving skills to identify and analyse issues, consider options and develop responses and opportunities for improvementOrganises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXDB401 Develop and implement recruitment processes that are inclusive of people with disability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including evidence of the ability to conduct the following on at least one occasion:

- undertake a recruitment process on at least one occasion that includes 2 or more candidates, including:
 - identifying current legislative obligations that must be adhered to when recruiting
 - identifying and recommending any improvements to support workplace diversity and inclusion when recruiting
 - preparing a job description relevant to a workplace hiring need, including:
 - outlining inherent role requirements, task, skill and knowledge specifications
 - removing any exclusionary criteria that are not inherent to core role requirements
 - developing selection criteria that match the job requirements as well as support opportunities for candidates with disability
 - accessing employment agencies and/or specialist services to source candidates and confirm access requirements for recruitment processes, applications and interviews
 - selecting and using accessible communication channels, formats and technologies for promoting vacancies and accepting applications
 - developing non-discriminatory interview guides that match selection criteria
 - confirming the accessibility of any other assessment techniques or tools used
 - conducting recruitment and interviewing processes by:
 - consulting candidates to determine their communication and support needs
 - outlining any modifications required to assist them through the hiring process
 - selecting and using appropriate communication techniques, interview formats and environments, technologies or adjustments to meet individual candidate needs
 - involving any support persons as necessary and ensuring that they do not detract from the first hand interaction with the candidate (for example, by answering questions for the individual beyond a translation capacity)

- assessing candidates against selection criteria, make selections and justify choice
- seeking feedback on hiring processes from applicants and management.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- persons covered by the Disability Discrimination Act
- the social model of disability as compared to the medical model
- current legislation, standards and other instruments that promote the inclusion and rights of people with disability, including:
 - Disability Discrimination Act
 - Fair Work Act
 - Other State/Territory anti-discrimination legislation
 - United Nations Convention on the Rights of Persons with Disabilities
 - The National Disability Strategy
 - Accessibility standards, including the Web Content Accessibility Guidelines
- workplace responsibilities related to inclusive recruitment processes
- positive workplace outcomes resulting from the hiring of individuals with disability
- aspects of workplace operations that impact the outcomes of inclusive recruitment strategies, including:
 - staffing structure and workforce needs
 - workplace human resource and hiring practices
 - job needs, knowledge and skill requirements, and inherent role requirements
 - workplace diversity and inclusion objectives and policies
- workplace policies and protocols for:
 - recruitment and inclusion of people with disability
 - maintaining confidentiality and privacy for job applicants and staff members
 - responding to disclosure and/or sharing of information about disability
- inclusive language and person-first expressions to use when communicating with, or about, people with disability
- accessible and inclusive options for aspects of recruitment processes, including:
 - candidate sourcing methods
 - assessment techniques and tools
 - interview formats, environments and techniques
 - language and questioning strategies
- appropriate communication techniques, including use of plain English, and augmentative and alternative communication methods and aids
- disability employment services, other employment agencies or specialist services that can provide advice on accessible recruitment processes and assist with accessing talent pools.
-

Assessment Conditions

Skills must have been demonstrated in a real or simulated workplace. Simulations and scenarios are to be used where assessment in a workplace situation would be impractical, inappropriate, or not possible, particularly where skills relate to more sensitive or critical instances. The following conditions must be met for this unit:

Use of facilities, equipment and resources, including:

- access to details regarding the workplace recruitment need
- legislation and workplace policies related to diversity, inclusion and recruitment
- communication channels, assessment tools, and workplace technologies
- applicants with disability or case studies of applicants with disability

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXDB501 Support staff members with disability in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to support staff members with disability and address their workplace related needs. It involves coordinating additional support on an individualised level, to ensure that staff members are able to perform to the full extent of their capabilities with minimal barriers to work.

This unit applies to managers in organisations in various industries, who oversee other staff members.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|--|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Promote additional support to staff members | <p>1.1 Implement workplace initiatives that promote and encourage staff members to disclose and/or share information about their disability or support needs</p> <p>1.2 Inform staff members of the supports and adjustments available to them, the benefits of requesting support, and the processes through which they can discuss additional support</p> |

| | |
|---|--|
| | needs |
| 2. Plan to address additional support needs for staff members with disability | <p>2.1 Consult staff members who have self-identified, to discuss their work abilities, challenges and additional needs</p> <p>2.2 Establish goals and expectations for provision of additional support with individual staff members</p> <p>2.3 Agree with staff members on additional supports and strategies to implement, including any reasonable adjustments, to address their additional needs</p> |
| 3. Implement additional support for staff members with disability | <p>3.1 Make necessary workplace arrangements to implement additional support and/or reasonable adjustment for individual staff members</p> <p>3.2 Refer to additional support providers and specialists, where required support is beyond the scope of own role</p> <p>3.3 Advise other relevant staff of their role in providing additional support to individual staff members</p> <p>3.4 Review and seek feedback from staff members on implementation of strategies and supports</p> <p>3.5 Make changes to strategies and supports in line with staff members' feedback and preferences</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Accesses, reads and interprets detailed information related to resources and supports available |
| Writing | <ul style="list-style-type: none"> Develops and maintains workplace documentation accurately and in response to required needs |
| Communication | <ul style="list-style-type: none"> Discusses and seeks information using appropriate structure and language for the particular audience Uses questions and responses to clarify or confirm understanding Uses appropriate communication techniques to build rapport, trust and provide guidance and feedback |
| Navigate the world of work | <ul style="list-style-type: none"> Recognises and follows legislative requirements, organisational protocols, policies and procedures relevant to own role |

| | |
|----------------------|---|
| Interact with others | <ul style="list-style-type: none">• Cooperates and consults with others to clarify understanding, achieve joint outcomes and seek feedback |
| Get the work done | <ul style="list-style-type: none">• Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement• Organises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXDB501 Support staff members with disability in the workplace

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including, on at least one occasion, evidence of the ability to:

- communicate the supports available to staff members and encourage staff members to disclose disabilities and/or discuss additional support needs
- collaborate and consult with a minimum of three individual staff members with disability to:
 - identify work challenges and additional support needs
 - determine preferences for individual support
 - agree and document strategies, supports, reasonable adjustments and/or resources to implement to address support needs in line with organisational procedures
 - monitor effectiveness of supports and strategies and make any improvements as required to ensure additional support needs are met
 - involve any support persons as required throughout the process
- implement workplace arrangements and/or adjustments to fulfil provision of agreed additional support
- communicate roles and responsibilities related to support arrangements to other relevant staff
- refer to additional or specialist support providers to address support needs outside of scope of own role.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- current legislation, standards and other instruments that promote the needs and rights of people with disability, including:
 - Disability Discrimination Act
 - Disability Services Act

- Fair Work Act
- Other State/Territory anti-discrimination legislation
- United Nations Convention on the Rights of Persons with Disabilities
- The National Disability Strategy
- organisation protocols, policies and procedures for:
 - implementing modifications or supports for staff members
 - maintaining confidentiality, privacy and dignity for staff members
- the definition of 'reasonable adjustment' within the organisational context, taking note of the organisation's size, capabilities and resource base
- support strategies, resources and reasonable adjustments that can be implemented to meet staff member support needs, including:
 - workplace modifications, equipment and facilities
 - assistive technologies, devices and aids
 - augmentative and alternative communication methods
 - use of plain English
 - flexible work options
 - cognitive and work tools
 - support services and specialist support providers
 - Government agencies and funds that provide services and support to people with disability and their employers
- anonymous and identifying processes for staff members to learn about available supports and discuss support needs, including:
 - online resources
 - hotlines
 - workplace support teams
 - one-on-one conversations
- inclusive language and person-first expressions to use when communicating with, or about, staff members with disability.
-

Assessment Conditions

The following conditions must be met for this unit:

Use of facilities, equipment and resources, including:

- a work team, or workplace case study, consisting of minimum five staff members, where at least three have a disability
- relevant legislation and workplace documents that address workplace inclusion and diversity practices and responsibilities, provision of workplace adjustment or additional support
- workplace disability and support policies and codes of practice

Industry or simulated operating conditions, including:

- challenges typical in work with staff members with disability and additional support needs
- scenarios or opportunities that require real-time, interpersonal interactions and problem solving with other staff members and support providers

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to identify access requirements and barriers for people with different types of disability within organisational design, environments, and processes. It involves planning processes of organisational change to ensure people with disability experience equal access and inclusion within an organisational setting.

This unit applies to organisational managers and leaders across various industries with administrative responsibilities. Their roles and responsibilities would include planning, changing and evaluating organisational environments, processes, facilities and resources to enhance accessibility for people with disability.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|---|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Determine current accessibility of an organisation | 1.1 Assess current organisational compliance with accessibility legislation and standards 1.2 Identify current barriers to access within environmental |

| | |
|---|--|
| | and operational aspects of an organisation |
| 2. Identify how barriers to access can be addressed | <p>2.1 Identify access solutions to address identified organisational access barriers</p> <p>2.2 Seek feedback from internal and external stakeholders to confirm viability of proposed access solutions</p> <p>2.3 Outline accessibility changes to be made to the environmental and operational aspects of an organisation</p> |
| 3. Implement accessibility improvements | <p>3.1 Develop plan to implement changes within scope of own role</p> <p>3.2 Communicate changes and ongoing access responsibilities to members of the organisation whose roles are impacted</p> <p>3.3 Seek approval from management for accessibility changes outside the limits of own role</p> |
| 4. Evaluate accessibility plan and update as required | <p>4.1 Evaluate accessibility plan against identified goals, consulting internal and external stakeholders as required</p> <p>4.2 Document and implement any further improvements to be made to ensure organisational accessibility</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Learning | <ul style="list-style-type: none"> Undertakes research activities to understand access needs and obligations |
| Reading | <ul style="list-style-type: none"> Sources, analyses and interprets detailed information related to access needs and organisational obligations |
| Writing | <ul style="list-style-type: none"> Structures content and documents in a logical, detailed and accurate manner which incorporates recommendations |
| Navigate the world of work | <ul style="list-style-type: none"> Identifies, confirms and takes responsibility for adherence to legal and ethical requirements, organisational policies and procedures relevant to own role |
| Interact with | <ul style="list-style-type: none"> Uses inclusive and collaborative techniques to seek feedback, negotiate and consult with a range of stakeholders |

| | |
|-------------------|--|
| others | |
| Get the work done | <ul style="list-style-type: none">• Uses systematic and analytical processes to gather information and identify and evaluate options against criteria• Uses problem-solving skills to identify and analyse issues or barriers, consider options and develop responses and opportunities for improvement• Organises and completes work according to defined requirements, taking responsibility for decisions, planning and implementing activities, and sequencing tasks to achieve efficient outcomes |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including, on at least one occasion, evidence of the ability to:

- determine organisational obligations under current accessibility and anti-discrimination legislation, and standards
- determine to what extent an organisation is currently meeting compliance requirements
- analyse and confirm requirements for access and use for people with differing disabilities, specific to the organisational context
- outline barriers to access that must be addressed within an organisation
- apply the Principles of Universal Design to the environmental and operational aspects of an organisation
- develop practical solutions that effectively address identified opportunities to improve accessibility, leveraging research findings and technological developments where appropriate
- consult with internal and external stakeholders, such as customers, colleagues or access experts, as required to test solutions, confirm suitability, and develop implementation plan for changes
- review and update implementation plan as required.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- current access and anti-discrimination legislation and standards, including:
 - Disability Discrimination Act
 - State and Territory anti-discrimination legislation
 - United Nations Convention on the Rights of Persons with Disabilities
 - Disability Services Act
 - National Disability Strategy

- The Web Content Accessibility Guidelines
- accessibility compliance requirements for organisations
- persons covered by the Disability Discrimination Act and associated accessibility requirements
- features of the social model of disability as compared to the medical model
- where barriers to access and inclusion exist within the organisational environment
- typical barriers to access within an organisation, including:
 - premises and facilities
 - environmental and sensory factors
 - organisational information resources
 - communication systems and contact points
 - organisational processes
 - operating systems
 - technological platforms
 - organisational culture and behaviours
- Principles of Universal Design
- tools and tests that can be utilised to test the accessibility of websites and other online content or digital platforms
- different communication techniques and methods of presenting information, including:
 - alternative and augmentative communication strategies
 - use of plain English
- assistive technologies, design developments and solutions that can help address access needs
- access experts and resources that can assist with addressing accessibility requirements.

Assessment Conditions

Skills must have been demonstrated in the workplace. The following conditions must be met for this unit:

Use of facilities, equipment and resources, including:

- access to details regarding the environmental and operational aspects of the organisation
- legislation, standards and organisational policies relevant to accessibility and inclusion
- internal or external organisational stakeholders to consult regarding access solutions
- information regarding the impact and outcomes of implemented accessibility changes
- opportunities for consultation or collaboration with real accessibility stakeholders, to support the implementation of access improvements.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXTW301 Work in a team

Modification History

| Release | Comments |
|-----------|--|
| Release 2 | This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify typographical error |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to work effectively as part of permanent or project based teams in a workplace within an industry.

This unit applies to a wide range of workers, but has a specific focus on the teamwork skills required for workers with limited responsibility for others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|---|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Identify individual work tasks within a team | 1.1 Identify own responsibilities according to organisational policies and procedures 1.2 Identify own role and task requirements within team 1.3 Articulate team structure and roles of other team members 1.4 Plan and prioritise own tasks according to given time frames and |

| | |
|--|--|
| | team requirements |
| 2. Contribute effectively to team goals | <p>2.1 Identify team goals and own responsibilities relevant to achieving team goals</p> <p>2.2 Contribute ideas and information in team planning discussions</p> <p>2.3 Share knowledge and skills with team members to enable effective teamwork and seek or offer support as required</p> |
| 3. Work effectively with team members | <p>3.1 Communicate clearly and respectfully with team members, considering the needs of those from diverse backgrounds and roles</p> <p>3.2 Collaborate effectively with team members, including those who are working remotely on workplace issues</p> <p>3.3 Seek and provide assistance and feedback to team members where appropriate</p> |
| 4. Communicate effectively with team leaders | <p>4.1 Receive and confirm understanding of task instructions or directions</p> <p>4.2 Communicate personal commitments in a timely manner</p> <p>4.3 Identify and report any issues preventing the completion of workplace tasks, according to organisational requirements</p> <p>4.4 Seek and act upon feedback to improve personal performance and/or behaviour</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------|--|
| Interact with others | <ul style="list-style-type: none"> • Uses appropriate communication practices when communicating with others • Cooperates and collaborates with team members |
| Get the work done | <ul style="list-style-type: none"> • Plans and implements routine tasks and workload making limited decisions on sequencing, timing and collaboration, seeking assistance in setting priorities • Uses digital technology to find, record or communicate information |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXTW301 Work in a team

Modification History

| Release | Comments |
|-----------|--|
| Release 2 | This version first released with BSB Business Services Training Package Version 5.0. Version created to rectify typographical error |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including on at least one occasion, evidence of the ability to:

- identify individual and team roles and responsibilities
- plan assigned tasks according to priorities and deadlines, and in accordance with organisational requirements
- contribute to achievement of team goals
- share knowledge, ideas and problems with team members
- act on feedback in a constructive manner
- collaborate with a remote team member on a workplace issue.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- organisational requirements relevant to working in a workplace team:
 - workplace policies
 - codes of conduct
 - organisational reputation and culture
- typical compositions of workplace teams, and the roles and responsibilities of team members within organisations
- techniques for giving and receiving feedback in a constructive manner
- methods to support team members
- key principles of cross-cultural communication and communication with individuals with special needs or disabilities

- methods and tools to work with others remotely:
 - collaboration via phone or mobile
 - collaboration via video conference
 - collaboration via other digital tools or software
- issues that may impact team performance and outcomes
- techniques to collaborate effectively with those working remotely.
-

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBXTW401 Lead and facilitate a team

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Version created to clarify knowledge evidence |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to effectively lead and facilitate a team in a workplace within any industry.

This unit has a specific focus on the teamwork skills required for team leader or supervisor level (depending on organisational structure) workers with responsibility for others or teams.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cross Sector Skill

Elements and Performance Criteria

| Elements | Performance Criteria |
|---|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Plan team outcomes | 1.1 Identify common objectives of workplace team, responsibilities and required outcome(s) 1.2 Use performance plans to establish expected outcomes, goals, and behaviours for individual team members in accordance with team objective and relevant policies |

| | |
|------------------------------------|---|
| | <p>1.3 Select appropriate strategies to ensure team members are accountable for their roles and responsibilities</p> <p>1.4 Plan for contingencies that could impact the team</p> |
| 2. Coordinate team and individuals | <p>2.1 Communicate common team objectives and responsibilities to team members</p> <p>2.2 Allocate tasks to team members based on staff expertise or development potential and provide appropriate instructions</p> <p>2.3 Facilitate open and respectful communication and collaboration between team members, considering the needs of those from diverse backgrounds</p> <p>2.4 Identify opportunities for cross collaboration amongst external and internal teams and individuals</p> |
| 3. Support team | <p>3.1 Provide coaching to staff to enhance workplace culture</p> <p>3.2 Support individuals according to organisational requirements to work towards common team goals</p> <p>3.3 Facilitate team to identify, brainstorm, report and resolve task related issues and inefficiencies</p> <p>3.4 Use problem solving skills to deal with any team, task or individual challenges</p> |
| 4. Monitor team performance | <p>4.1 Measure team member performance against agreed work plans</p> <p>4.2 Provide timely and constructive performance feedback to team members according to expected organisational standards</p> <p>4.3 Identify specific learning and development opportunities to improve team and individual performance and behaviours</p> <p>4.4 Implement action plans to address individual and team training needs</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------|---|
| Interact with others | <ul style="list-style-type: none"> • Uses appropriate communication practices when communicating with team members and facilitating activities • Establishes and builds relationships and rapport with team members to foster a positive team environment • Recognises the perspectives of team members and diversity of |

| Skill | Description |
|----------------------------|---|
| | opinion, and manages conflict as required |
| Navigate the world of work | <ul style="list-style-type: none">Understands and explains ethical and legal, regulatory and organisational responsibilities to team |
| Get the work done | <ul style="list-style-type: none">Plans, organises and implements work activities in line with organisational policies and procedures |

Unit Mapping Information

No equivalent unit. New unit.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBXTW401 Lead and facilitate a team

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version released with BSB Business Services Training Package Version 7.0. Version created to clarify knowledge evidence |
| Release 1 | This version first released with BSB Business Services Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria, and foundation skills of this unit, including on at least one occasion, evidence of the ability to:

- assign tasks to team members with appropriate instruction and considering any required contingencies
- provide feedback and assistance to team members
- collate feedback on individual and team performance
- identify and implement development opportunities for others
- manage conflicts and challenges according to organisational requirements.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- organisational requirements relevant to workplace teams:
 - workplace policies
 - codes of conduct
 - organisational reputation and culture
- legislative requirements relevant to the workplace
- facilitation techniques to encourage team cohesion and effectiveness
- mentoring and coaching techniques to support team members
- strategies for conflict resolution and negotiation
- different methods and styles of communication

- key principles of cross-cultural communication and communication with individuals with special needs or disabilities
- professional behaviours to role model as a leader
- typical workplace contingencies that can impact teams:
 - unplanned leave or absence of workers
 - re-allocation of work tasks
 - succession planning for important team roles
- teamwork challenges relevant to performance evidence:
 - difficulties performing tasks
 - conflicts with clients or team members
 - potential risks or safety hazards
 - unethical or inappropriate behaviour.

Assessment Conditions

Mandatory conditions for assessment include:

- A safe working or simulated environment

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

AHCBUS615 Implement a monitoring, evaluation and reporting program

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version released with AHC Agriculture, Horticulture and Conservation and Land Management Training Package Version 4.0. |

Application

This unit of competency describes the skills and knowledge required to implement a monitoring, evaluation and reporting program.

This unit applies to individuals who take personal responsibility for their own work and exercise autonomy in undertaking complex work. They must analyse information and exercise judgement to complete a range of advanced skilled activities in relation to implementing the program. They analyse, design and communicate solutions to a range of complex problems.

All work must be carried out to comply with organisational requirements, workplace health and safety legislation and codes, sustainability practices, and in consultation with the management team.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Unit Sector

Business (BUS)

Elements and Performance Criteria

| Elements | Performance Criteria |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Implement a monitoring and | 1.1 Collect baseline data for program to be monitored and evaluated |

| Elements | Performance Criteria |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| evaluation strategy | 1.2 Consult with stakeholders with an interest in the program to be monitored and evaluated 1.3 Brief colleagues, staff and contractors who will be involved in implementing the program on the monitoring and evaluation methods selected and justification 1.4 Ensure standard procedures and recording templates are available for use 1.5 Ensure program timelines are communicated and monitored 1.6 Implement chosen monitoring and evaluation methods in accordance with defined strategy 1.7 Monitor program expenditure and compare with budget |
| 2. Collect and analyse data | 2.1 Ensure data and information is collected following relevant standards and format 2.2 Assess if further data or information is needed to answer key evaluation questions and adjust design as required 2.3 Ensure data is appropriately stored and can be accessed as needed 2.4 Facilitate access for colleagues and contractors involved in the monitoring and evaluation process |
| 3. Prepare reports and provide information | 3.1 Compare outcomes against milestones 3.2 Produce reports with information appropriate for stakeholders 3.3 Evaluate the effectiveness, efficiency and appropriateness of investment and project priorities as required by the evaluation design 3.4 Communicate findings and recommendations to stakeholder groups according to program schedule 3.5 Negotiate changes to projects and programs with stakeholders 3.6 Implement changes to improve the delivery and alignment of projects with organisational targets 3.7 Ensure the style of reporting reflects the needs of the audience and how information is to be used |
| 4. Review the monitoring and evaluation process | 4.1 Review and adapt ongoing evaluation strategy and processes, and provide feedback on the implementation and the evaluation design 4.2 Foster a culture of self-evaluation and learning through encouraging ongoing participation, consultation and communication with stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential for performance in this unit of competency but are not explicit in the performance criteria.

| Skill | Description |
|--------------------|---|
| Writing | <ul style="list-style-type: none">Produces reports that include data compiled in tables and charts that convey information about the effectiveness and efficiency of the business |
| Oral communication | <ul style="list-style-type: none">Effectively engages stakeholders in monitoring, evaluation and reporting programEffectively presents findings of evaluations to stakeholders |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|--|--------------------|
| AHCBUS615 Implement a monitoring, evaluation and reporting program | AHCBUS607 Implement a monitoring, evaluation and reporting program | Performance criteria clarified Foundation skills added Assessment requirements updated | Equivalent unit |

Links

Companion Volumes, including Implementation Guides, are available at VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c6399549-9c62-4a5e-bf1a-524b2322cf72>

Assessment Requirements for AHCBUS615 Implement a monitoring, evaluation and reporting program

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version released with AHC Agriculture, Horticulture and Conservation and Land Management Training Package Version 4.0. |

Performance Evidence

An individual demonstrating competency must satisfy all of the elements and performance criteria in this unit. There must be evidence that the individual has implemented a monitoring, evaluation and reporting program for at least one enterprise, or enterprise activity, including:

- collected and managed data
- analysed production or project data
- prepared reports and presented information to stakeholders
- evaluated the effectiveness, efficiency and appropriateness of investment in a project or program
- made recommendations for improvement
- reviewed the evaluation process.

Knowledge Evidence

An individual must be able to demonstrate the knowledge required to perform the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- quantitative and qualitative methods for monitoring and evaluation
- communication and consultation skills to present findings and recommendations
- data management processes and systems
- policy and program management processes
- adaptive management and review cycles.

Assessment Conditions

Assessment of skills must take place under the following conditions:

- physical conditions:
 - skills must be demonstrated in workplace setting or an environment that accurately represents workplace conditions
- resources, equipment and materials:

- enterprise process or project to be monitored and evaluated.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volumes, including Implementation Guides, are available at VETNet: -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c6399549-9c62-4a5e-bf1a-524b2322cf72>

CPPCMN4009 Develop team understanding of and commitment to sustainability

Modification History

Release 1.

Replaces superseded equivalent CPPCMN4009A Develop team understanding of and commitment to sustainability.

This version first released with CPP Property Services Training Package Version 5.

Application

This unit of competency specifies the outcomes required to develop and support team members to build their understanding of and commitment to the principles and practices associated with sustainability. The ability to lead and motivate a team and to develop and use coaching, mentoring and learning strategies that bring about organisational and cultural change are required.

The unit supports businesses in adopting sustainable practices and policies that go beyond meeting mandated requirements, to harnessing opportunities. It applies to individuals responsible for leading team members in a business committed to economic, social and environmental sustainability.

No licensing, legislative, regulatory, or certification requirements apply to this unit of competency at the time of endorsement.

Pre-requisite Unit

Nil

Competency Field

Common

Unit Sector

Property services

Elements and Performance Criteria

| | |
|---|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions. |
| 1. Support the building of skills to reflect sustainability principles. | <p>1.1. Purpose, benefits and practices of <i>sustainability</i> are researched and analysed.</p> <p>1.2. Government policies and incentives regarding the implementation of sustainable business practices are accessed and reviewed.</p> <p>1.3. Current organisational strategies, policies and procedures regarding the implementation of sustainable practices are accessed and reviewed.</p> <p>1.4. Information is gathered on existing staff skills, knowledge and behaviours in relation to sustainability, and gaps are identified.</p> <p>1.5. Contribution is made to developing and documenting a strategy to build required staff skills, and their understanding of the purpose, benefits and practices of sustainability.</p> |
| 2. Support the implementation of sustainable practices. | <p>2.1. Organisational goals and objectives relating to sustainability are communicated to staff.</p> <p>2.2. Individuals and teams are provided with guidance to establish goals, responsibilities and <i>performance indicators</i> relating to sustainability.</p> <p>2.3. Individuals and teams are supported in enhancing performance and achievement of organisation's goals, including effective implementation of sustainability processes, policies and procedures.</p> <p>2.4. Own performance is managed in line with organisational and legal requirements.</p> |
| 3. Lead the team effectively. | <p>3.1. Updates on the organisation's plans and approach to implementing sustainability processes are communicated to staff using effective and open communication channels.</p> <p>3.2. Staff are coached and mentored to develop understanding of sustainability issues and improve the implementation and performance of workplace</p> |

processes.

- 3.3. Effective strategies to facilitate team growth and increase motivation are developed, trialled and implemented.
- 3.4. Outcomes of sustainability initiatives in the workplace are communicated and effective performance is acknowledged and supported in line with organisational policies and guidelines.
4. Contribute to staff development needs.
 - 4.1. Current and future staff development needs relating to sustainability are identified and documented.
 - 4.2. Staff members are provided with opportunities to develop skills and knowledge relating to sustainability.
 - 4.3. Training and development needs of staff are accounted for in relevant budgets and operational plans.

Foundation Skills

This section describes the language, literacy, numeracy and employment skills essential to performance in this unit but not explicit in the performance criteria.

| Skill | Performance feature |
|-------------------------------|---|
| Learning skills to: | <ul style="list-style-type: none"> maintain current knowledge of sustainability policies and practices used in business. |
| Numeracy skills to: | <ul style="list-style-type: none"> use graphs and statistics to report on business attainment of performance indicators relating to sustainability. |
| Oral communication skills to: | <ul style="list-style-type: none"> respond to complex questions from team members about sustainability policies and practices of the business and performance against sustainability performance indicators. |
| Reading skills to: | <ul style="list-style-type: none"> read and assess reports and papers on building support among team members for organisational sustainability policies. |
| Writing skills to: | <ul style="list-style-type: none"> prepare reports on existing staff skills, knowledge and behaviours in relation to sustainability. |
| Technology skills to: | <ul style="list-style-type: none"> use business technologies to communicate with team members on the outcomes of sustainability initiatives in the workplace. |

Range of Conditions

This section specifies work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included. Bold italicised wording, if used in the performance criteria, is detailed below.

- Sustainability*** must include:
- economic sustainability, demonstrated by:
 - cost-effective use of resources
 - ensuring costs of ‘green’ solutions are properly accounted for and recovered
 - growing market share by appealing to socially aware customers
 - purchasing locally to reduce transport costs
 - seeking to participate in government schemes that reward or fund sustainable operations
 - social sustainability, demonstrated by:
 - building community involvement
 - communicating benefits of sustainable products and services to customers
 - purchasing locally and using local and community-based products and services
 - using ‘fair trade’ products
 - environmental sustainability, demonstrated by:
 - efficient use of resources
 - eliminating hazardous and toxic materials
 - identifying strategies to offset or mitigate environmental impacts, such as purchasing carbon credits
 - making more efficient use of energy
 - maximising opportunities to re-use and recycle materials
 - preventing and minimising risks and maximising opportunities, such as use of solar or other alternative forms of energy where appropriate
 - purchasing renewable energy
 - reducing emissions of greenhouse gases
 - reducing use of non-renewable resources
 - reducing waste.

Performance

indicators must

include at least two of the following:

- benchmarks achieved against external certification process requirements
- costs measured against performance targets
- level of recycling achieved and reduction of waste
- response to marketing and communication strategies
- sales achieved measured against performance targets.

Unit Mapping Information

CPPCMN4009A Develop team understanding of and commitment to sustainability

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6f3f9672-30e8-4835-b348-205dfcf13d9b>

Assessment Requirements for CPPCMN4009 Develop team understanding of and commitment to sustainability

Modification History

Release 1.

Replaces superseded equivalent CPPCMN4009A Develop team understanding of and commitment to sustainability.

This version first released with CPP Property Services Training Package Version 5.

Performance Evidence

A person demonstrating competency in this unit must satisfy all of the elements, performance criteria, foundation skills and range of conditions of this unit.

The person must also lead a team involved in implementing and monitoring a sustainable business practice in an organisation. The sustainable business practice must focus on at least one of the following:

- economic sustainability
- social sustainability
- environmental sustainability
- integrated economic, social and environmental sustainability.

In doing the above, the person must:

- research and identify good sustainability business practices
- support the implementation of sustainability practices, including leading and motivating a team involved in implementing sustainability practices
- develop and use coaching, mentoring and learning strategies that bring about organisational and cultural change in relation to the sustainability focus.

Knowledge Evidence

A person demonstrating competency in this unit must demonstrate knowledge of:

- concepts and models of sustainability
- concepts and models of team leadership
- organisational policies and procedures relating to sustainable practices
- strategies, tools and products to support sustainable practices in the organisation
- adult learning and development principles and processes

- legislative and regulatory requirements relating to sustainability
- techniques for identifying training needs
- theories of work team motivation.

Assessment Conditions

The following must be present and available to learners during assessment activities:

- equipment:
 - computer system with internet, email and printing facilities
- specifications:
 - organisational sustainability policies
 - resources explaining and providing examples of sustainable business practices
 - reports from other parties involved in the process of identifying and implementing sustainability practices
- relationship with team members:
 - leading a work team in a property industry context.

Assessor requirements

As a minimum, assessors must satisfy the assessor requirements in the *Standards for Registered Training Organisations* (RTOs) current at the time of assessment.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6f3f9672-30e8-4835-b348-205dfcf13d9b>

CPPDSM4047 Implement and monitor procurement process

Modification History

Release 1.

Replaces superseded equivalent CPPDSM4047A Implement and monitor procurement process.

This version first released with CPP Property Services Training Package Version 5.

Application

This unit of competency specifies the outcomes required to implement and monitor purchasing processes for goods and services. It requires the ability to follow procurement procedures, determine and arrange appropriate suppliers, and check that final procurement meets client objectives.

The unit supports workers in the property industry who are involved in implementing and monitoring purchasing processes for goods and services. It applies to real estate agents, property managers, strata managers and facility managers.

Licensing, legislative, regulatory or certification requirements apply to this unit in some States and Territories. Relevant state and territory regulatory authorities should be consulted to confirm those requirements.

Pre-requisite Unit

Nil

Competency Field

Strata community management

Unit Sector

Property services

Elements and Performance Criteria

Elements describe the essential outcomes.

Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions.

- | | |
|--|--|
| 1. Determine procurement requirements. | 1.1. Procurement requirements and objectives are identified. 1.2. Information on procurement requirements is gathered and reviewed to determine appropriate <i>procurement process</i> and timelines. 1.3. Factors likely to affect procurement objectives are identified. 1.4. Own limitations of authority are identified and appropriate approvals gained as required. |
| 2. Monitor procurement process. | 2.1. Procurement process is systematically monitored and variations to supply are identified. 2.2. Effective communication channels are used to ensure accurate communication flow with suppliers. 2.3. Expenditure and resource usage are monitored to ensure procurement objectives are achieved within budget parameters. 2.4. Reliable methods of monitoring procurement are used to ensure efficient use of time and resources. |
| 3. Finalise procurement process. | 3.1. Purchase of goods and services is completed within designated timeframes. 3.2. Inspection is arranged to confirm procurement meets required quality standards and procurement objectives. 3.3. Defects or variances to procurement objectives are identified and prompt remedial action is taken. 3.4. Procurement system and records, and reports on procurement process, are maintained using business equipment and technology. |

Foundation Skills

This section describes the language, literacy, numeracy and employment skills essential to performance in this unit but not explicit in the performance criteria.

| Skill | Performance feature |
|-------------------------------|---|
| Learning skills to: | <ul style="list-style-type: none">• maintain current knowledge of procurement procedures. |
| Oral communication skills to: | <ul style="list-style-type: none">• discuss and confirm procurement arrangements with suppliers. |
| Reading skills to: | <ul style="list-style-type: none">• interpret procurement documentation. |
| Writing skills to: | <ul style="list-style-type: none">• complete standards forms and prepare complex written reports on defects or variations to goods or services ordered through procurement process. |

Range of Conditions

This section specifies work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included. Bold italicised wording, if used in the performance criteria, is detailed below.

| | |
|-----------------------------------|---|
| <i>Procurement process</i> | <ul style="list-style-type: none">• open tendering |
| must include at least | <ul style="list-style-type: none">• request for proposal |
| two of the following: | <ul style="list-style-type: none">• request for quotation• restricted tendering• single source• two stage tendering. |

Unit Mapping Information

CPPDSM4047A Implement and monitor procurement process

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6f3f9672-30e8-4835-b348-205dfcfl3d9b>

Assessment Requirements for CPPDSM4047 Implement and monitor procurement process

Modification History

Release 1.

Replaces superseded equivalent CPPDSM4047A Implement and monitor procurement process.

This version first released with CPP Property Services Training Package Version 5.

Performance Evidence

A person demonstrating competency in this unit must satisfy all of the elements, performance criteria, foundation skills and range of conditions of this unit.

The person must also implement and monitor purchasing processes for two different goods or services relating to managing a building or facility.

Each product or service must be procured using a different procurement method selected from the following:

- open tendering
- request for proposal
- request for quotation
- restricted tendering
- single source
- two-stage tendering.

In doing the above, the person must:

- review procurement objectives and relevant information to determine procurement processes, and source appropriate authority or delegations for procurement
- finalise procurement process within agreed timeframes, using business equipment and technology to maintain records and reports
- apply knowledge of organisation's practices, ethical standards, and legislative requirements associated with implementing and monitoring purchasing processes for goods and services
- use effective oral and written communication to effectively monitor the implementation of the procurement process against budget parameters.

Knowledge Evidence

A person demonstrating competency in this unit must demonstrate knowledge of:

- benefits and risks associated with, and procedures for, the following procurement processes:
 - open tendering
 - request for proposal
 - request for quotation
 - restricted tendering
 - single source
 - two-stage tendering
- best practice procurement principles
- implications of warranties, guarantees and exclusions relating to goods and services
- key principles of procurement, including:
 - accountability and recording
 - ethics and fair dealing
 - open and effective competition
 - planning and professionalism
 - value for money
- limitations of own work role, responsibilities and professional abilities
- key requirements of federal, state or territory legislation and local government regulations relating to:
 - anti-discrimination
 - consumer protection
 - environmental issues
 - equal employment opportunity (EEO)
 - financial probity
 - franchise and business structures
 - industrial relations
 - work health and safety (WHS).

Assessment Conditions

The following must be present and available to learners during assessment activities:

- equipment:
 - computer system with internet, email and printing facilities
- specifications:
 - details of goods or services to be procured
 - organisational procurement policies and procedures
 - organisational procurement process checklist
 - guides on procurement processes and procedures

- relationship with team members and supervisor:
 - member of a work team in a property industry context.

Assessor requirements

As a minimum, assessors must satisfy the assessor requirements in the *Standards for Registered Training Organisations* (RTOs) current at the time of assessment.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6f3f9672-30e8-4835-b348-205dfcf13d9b>

CPPWMT3044A Identify wastes and hazards

Modification History

Revised unit

Unit updated and equivalent to PRMWM44B Identify wastes and hazards

Unit Descriptor

This unit of competency specifies the outcomes required to identify a range of wastes and potential hazards and risks that may be present in the work environment.

Application of the Unit

This unit of competency supports individuals with responsibilities for identifying wastes and potential hazards and risks in a team environment. It includes following direction, systems and plans, as well as recognising the need for expert advice.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

- | | | | |
|---|-----------------------------|-----|---|
| 1 | Identify waste. | 1.1 | <i>Waste characteristics</i> are identified. |
| | | 1.2 | Types of wastes are differentiated by <i>waste stream</i> or <i>waste categories</i> . |
| | | 1.3 | <i>Hazardous and dangerous waste</i> and <i>non-conforming waste</i> are detailed. |
| | | 1.4 | <i>Contaminants</i> present in waste are noted. |
| | | 1.5 | Further information on waste is obtained by questioning appropriate personnel to ensure correct identification. |
| 2 | Identify hazards and risks. | 2.1 | <i>Other potential hazards and risks</i> present in work environment are listed. |
| | | 2.2 | Supervisor and team members are informed of job requirements, hazards and risks. |
| | | 2.3 | Safe work practices that prevent risk behaviour are outlined to supervisor. |
| | | 2.4 | Emergency response procedures are practised with team members. |

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
 - identify hazards and risks
 - identify waste types and waste non-conformances
 - segregate valuable resources in composite materials
 - segregate waste types, including potentially hazardous waste
- interpersonal skills to work in a team environment
- literacy skills to:
 - list potential hazards and risks
 - document and keep records

- read and interpret:
 - emergency requirements
 - hazard advice
 - job sheets
 - work requirements and material safety data sheets (MSDS)
- oral communication skills to:
 - follow instructions
 - provide information
 - ask questions
- self-management skills to:
 - apply signalling techniques
 - conduct work practices safely and efficiently
 - plan and undertake routine tasks
 - prioritise duties
 - use emergency and personal protective equipment (PPE)

Required knowledge

- identification of:
 - waste contaminants
 - waste monitoring procedures
 - waste non-conformances
 - waste non-conformance handling procedures
 - waste types
 - waste management options
 - waste storage requirements
 - waste disposal and recovery routes
- procedures for containing segregated waste types, including containment and isolation of hazardous waste
- emergency response procedures relating to:
 - confined space procedures
 - duty of care
 - identification of work areas, including location of:
 - alarms
 - emergency equipment
 - communications equipment
 - coding systems
 - environmental agencies
 - environmental regulations
 - reporting requirements
 - signalling techniques

- waste management hierarchy
- waste containment methods and isolation of emergencies
- occupational health and safety (OHS) requirements relating to:
 - chemical storage and decanting
 - dangerous goods and hazardous substances
 - OHS hierarchy of control
 - basic first aid appropriate to likely hazards and risks in work environment
- potential hazards and risks relating to:
 - dangerous goods
 - potential incidents

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

| | |
|--|---|
| Overview of assessment | This unit of competency could be assessed by observation of practical demonstration in the workplace or in a simulated environment. |
| Critical aspects for assessment and evidence required to demonstrate competency in this unit | <p>A person who demonstrates competency in this unit must be able to provide evidence of the required skills and knowledge specified in this unit.</p> <p>In particular the person should demonstrate the ability to:</p> <ul style="list-style-type: none"> • identify a range of waste streams, hazardous wastes and waste contaminants • identify a range of potential hazards and risks present in the workplace • observe OHS requirements. |
| Context of and specific resources for assessment | <p>Assessment of essential underpinning knowledge may be conducted in an off-site context. It is to comply with relevant regulatory or Australian standards' requirements.</p> <p>Resource implications for assessment include:</p> <ul style="list-style-type: none"> • work plans and approved specifications • forms and procedures manuals. |
| Method of assessment | The process of identifying waste and hazards must meet industry expectations. If the environment is narrowly defined or is not representative of industry needs, it may be necessary to refer to portfolio case studies to assess competency in the identification of |

| | |
|-------------------------------------|--|
| | <p>waste and hazards.</p> <p>Assessment methods must:</p> <ul style="list-style-type: none"> • satisfy the endorsed Assessment Guidelines of the Property Services Training Package • include direct observation of tasks in real or simulated work conditions, with questioning to confirm the ability to consistently identify and correctly interpret the essential underpinning knowledge required for practical application • reinforce the integration of employability skills with workplace tasks and job roles • confirm that competency is verified and able to be transferred to other circumstances and environments. |
| Guidance information for assessment | <p>Reasonable adjustments for people with disabilities must be made to assessment processes where required. This could include access to modified equipment and other physical resources, and the provision of appropriate assessment support.</p> <p>Assessment processes and techniques should as far as is practical take into account the language, literacy and numeracy capacity of the candidate in relation to the competency being assessed.</p> <p>This unit could be assessed on its own or in combination with other units of competency relevant to the job function, for example:</p> <ul style="list-style-type: none"> • CPPWMT3005A Identify and segregate waste • CPPWMT3014A Manually sort waste. |

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

| | |
|--|--|
| <i>Waste characteristics</i> may include: | <ul style="list-style-type: none"> • density • level of contamination • quality • shape • size • volume • weight. |
| <i>Waste stream</i> may include: | <ul style="list-style-type: none"> • construction and demolition • dangerous goods |

| | |
|--|---|
| | <ul style="list-style-type: none"> • green waste • hazardous substances • municipal waste. |
| Waste categories may include: | <ul style="list-style-type: none"> • solid (non-hazardous), e.g. construction and demolition • liquid (non-hazardous), e.g. chemical and aqueous • hazardous – regulated, prescribed, quarantined, medical and clinical • recoverable resources, e.g. recyclable and green waste. |
| Hazardous and dangerous waste may include: | <ul style="list-style-type: none"> • all waste depending on the condition, environment and personal exposure • biological products • blood products • chemicals • electrical wiring • glass • hospital waste • leaking containers • medical waste • needles and syringes • oil and petrol. |
| Non-conforming waste may include: | <ul style="list-style-type: none"> • contamination • hazardous or dangerous waste • inferior quality and unacceptable waste streams. |
| Contaminants may include: | <ul style="list-style-type: none"> • sunlight • infestation • mixing waste types • rot or mould • waterlogging. |
| Other potential hazards and risks are those that may lead to: | <ul style="list-style-type: none"> • damage to plant, vehicle or property • harm to the environment • illness or injury to employees, contractors or the public • injuries resulting from manual handling and repetitive work. |
| Hazards and risks may include: | <ul style="list-style-type: none"> • broken glass • compaction equipment • contamination • dust • fire • hazardous waste (e.g. sharps) • narrow driveways • other vehicles and equipment • overhanging signs |

| | |
|--|---|
| | <ul style="list-style-type: none">• projectiles• spark-producing equipment• unguarded conveyor belts• weather. |
|--|---|

Unit Sector(s)

Waste management

Custom Content Section

Not applicable.

CUACNM601 Manage collection maintenance and preservation procedures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package version 2.0. |

Application

This unit describes the skills and knowledge required to establish, manage and evaluate procedures for the care, maintenance and preservation of collections. It involves the use of analytical, communication and planning skills, as well as knowledge of specific issues that apply to the care, maintenance, minimisation of risk and preservation of both print and electronic materials.

It applies to individuals who work in leadership positions and who are responsible for the physical care of collections.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Knowledge management - collection management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review and update maintenance and preservation procedures | 1.1 Assess care and maintenance needs of specific collections based on knowledge of requirements of different types of materials 1.2 Assess the need for, and organise appropriate access to, specialist expertise 1.3 Ensure that where applicable, preservation procedures comply |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>with organisational digital preservation policy</p> <p>1.4 Review and update policies, systems and procedures for the care, maintenance and preservation of material, anticipating and responding to problems and challenges that may arise</p> <p>1.5 Incorporate organisational priorities and constraints when developing new and revising existing procedures</p> <p>1.6 Communicate maintenance and preservation procedures to relevant staff</p> |
| 2. Establish risk-management strategies and procedures | <p>2.1 Identify key risk factors for collections, including digital collections, and assess organisational capability to address risk</p> <p>2.2 Develop appropriate risk-management strategies to prevent or minimise loss or damage in key areas, including the digital environment</p> <p>2.3 Develop appropriate migration strategies to ensure preservation of data</p> <p>2.4 Implement strategies, anticipating and responding to problems and challenges that may arise</p> |
| 3. Evaluate effectiveness of collection maintenance and preservation procedures | <p>3.1 Instigate systems for regularly monitoring collection maintenance and preservation procedures</p> <p>3.2 Monitor procedures and their implementation to identify aspects needing attention</p> <p>3.3 Assess the application of safe and secure work practices and take action to address problems that arise</p> <p>3.4 Contribute to monitoring the collection development and digital preservation policies of the organisation</p> <p>3.5 Consult with colleagues on a regular basis to obtain feedback on maintenance and preservation procedures</p> <p>3.6 Use feedback and outcomes of regular monitoring of staff performance and activities to improve procedures and to identify opportunities for own professional development</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance | Description |
|-------|-------------|-------------|
|-------|-------------|-------------|

| | Criteria | |
|----------------------------|---|--|
| Learning | 3.6 | <ul style="list-style-type: none"> • Uses feedback to identify opportunities to improve own skills or knowledge |
| Reading | 1.3, 1.4 | <ul style="list-style-type: none"> • Interprets and critically analyses complex text, including ideas and opinions of others and applies general information to specific contexts |
| Writing | 1.4, 1.5, 2.2, 2.3, 3.6 | <ul style="list-style-type: none"> • Modifies and creates material that incorporates synthesis of knowledge and information using appropriate terminology and cohesive language in a format appropriate to purpose • Conveys detailed and specific information and instructions requiring concise use of vocabulary, syntax and grammar |
| Oral communication | 1.2, 1.6, 3.5, 3.6 | <ul style="list-style-type: none"> • Uses sophisticated listening and questioning techniques in discussion of complex ideas and concepts with a wide range of stakeholders, including collection specialists and colleagues • Explains procedures and instructions to others, choosing language appropriate to audience |
| Navigate the world of work | 1.3, 1.4, 1.5, 3.1, 3.2, 3.3, 3.4 | <ul style="list-style-type: none"> • Works autonomously making high level decisions to achieve and improve organisational goals • Takes a lead role in the development of organisational strategies and procedures |
| Interact with others | 1.2, 1.6, 3.5, 3.6 | <ul style="list-style-type: none"> • Uses a variety of relevant communication tools and strategies in building and maintaining effective working relationships • Shares knowledge, information and experience openly as an integral part of the working relationship |
| Get the work done | 1.1, 1.2, 1.4, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3, 3.4, 3.6 | <ul style="list-style-type: none"> • Develops, manages and systematically reviews policies, systems and procedures for collection care, maintenance and preservation • Takes full responsibility for risk management, applying problem solving processes to determine solutions • Uses formal analytical and lateral thinking techniques for identifying issues, generating and evaluating possible solutions • Uses digital technologies to create, access and manage metadata • Shows awareness of the importance of data security and ensuring that digital preservation policies and procedures are implemented |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| CUACNM601 Manage collection maintenance and preservation procedures | CULICM602A Manage collection maintenance and preservation procedures | Updated to meet Standards for Training Packages and clarify intent. Minor edits to performance criteria. | Equivalent Unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

Assessment Requirements for CUACNM601 Manage collection maintenance and preservation procedures

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package version 2.0. |

Performance Evidence

Evidence of the ability to:

- manage care and maintenance procedures to meet specific collection and organisational needs
- systematically review and monitor the organisation's policies and procedures for collection care, maintenance and preservation
- apply organisation's collection development policies and procedures, particularly the digital preservation policy
- evaluate the care and maintenance procedures of specific collections
- interact with colleagues and specialist experts on development issues, as required, to complement own skill set
- pursue opportunities for own professional development regarding new and emerging trends in maintenance and preservation procedures and strategies
- model due diligence and professionalism in complex judgements and decisions.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- detail strategies for the storage, display, preservation and conservation of different types of information materials
- identify risk factors for different types of information materials
- describe the nature of cooperative arrangements that exist between information services providers in relation to collection care and maintenance
- analyse issues that affect the care, maintenance and preservation of specific types of information materials, both print and electronic

- identify copyright, moral rights and intellectual property issues that affect collection care and management
- review organisational collection development policies on the care, maintenance and preservation of specific information collections
- describe cultural protocols that impact on collection care and management
- discuss the purposes and objectives of existing digital preservation policies
- discuss the benefits and limitations of digital preservation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- a collection for which procedures must be managed
- relevant policies and procedures manuals, including those relating to the preservation of digital collections.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

CUAEVP211 Assist with the staging of public activities or events

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to complete a range of tasks associated with setting up and staging public activities or events.

It applies to individuals who provide basic assistance at any type of public activity or event while under direct supervision.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cultural services - exhibitions and visitor programs

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for public activities or events | 1.1 Determine the type of public activity or event and identify own role with regard to preparation activity 1.2 Discuss the activity or event set-up and staging details with supervisor 1.3 Discuss work plans; workplace procedures, including safe work practices, security arrangements and emergency procedures; and resource requirements with supervisor |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|---|
| | 1.4 Complete allocated tasks within given timeframes and in accordance with work instructions |
| 2. Undertake on-site activities | 2.1 Set up and maintain activities according to work plan and workplace procedures, communicating effectively with supervisor, work colleagues and other relevant personnel 2.2 Assist delivery of activities in line with workplace procedures 2.3 Identify public activity or event related problems and resolve or refer to supervisor |
| 3. Finalise on-site activities | 3.1 Conduct pack-up and clean-up of materials and site according to work plan and workplace procedures 3.2 Complete and submit relevant documentation |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Interprets work instructions and requirements from key workplace information |
| Writing | <ul style="list-style-type: none"> Records information in a sequential manner using clear and appropriate terminology |
| Oral Communication | <ul style="list-style-type: none"> Articulates clearly using language appropriate to environment and audience Uses listening and questioning techniques to clarify and confirm understanding of routine work issues |
| Numeracy | <ul style="list-style-type: none"> Correctly interprets and follows numerical information in work plans, timelines and other documentation |
| Navigate the world of work | <ul style="list-style-type: none"> Follows organisational procedures relevant to own role, seeking clarification when required |
| Interact with others | <ul style="list-style-type: none"> Follows accepted communication practices and protocols for reporting matters to supervisors |
| Get the work done | <ul style="list-style-type: none"> Follows clearly defined instructions and sequencing, and monitors own progress in meeting requirements, seeking assistance when necessary Responds to predictable routine problems according to required procedures |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| CUAEVP211 Assist with the staging of public activities or events (Release 1) | CUAEVP201 Assist with the staging of public activities and events (Release 1) | Incorporated knowledge evidence on communication techniques and language. Minor edit to unit title. | Equivalent Unit |
| CUAEVP201 Assist with the staging of public activities and events (Release 1) | CULEVP201A Assist with the presentation of public activities and events | Updated to meet Standards for Training Packages Change to unit title. Minor edits to performance criteria and elements to clarify intent. | Equivalent Unit |

Links

Companion Volumes are available from VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

Assessment Requirements for CUA EVP211 Assist with the staging of public activities or events

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements and performance criteria of this unit; including evidence of the ability to:

- identify role and responsibilities in the set-up, maintenance and clean-up of a public activity or event
- complete allocated tasks within given timeframes and in accordance with work instructions
- undertake set-up, maintenance and clean-up activities as per work plan and workplace procedures
- resolve or refer problems identified during work activities
- complete and submit documentation in line with work instructions and workplace procedures.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes:

- key features of different types of public activities or events
- roles and responsibilities of key team members in the set-up and operation of public activities or events
- appropriate communication techniques and language, including interaction with cross-cultural groups and people with disabilities
- key procedures and practices required in the set-up, maintenance and clean-up of public activities or events, including:

- emergency procedures relevant to the work context
- safe work practices relevant to public activities or events
- security requirements relevant to public activities or events.
-

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a creative arts working environment or workplace. This includes access to:

- a location in which public events or activities take place
- a public activity or event on which the candidate can work
- interaction with others involved in staging a public activity or event.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volumes are available from VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

CUAEVP411 Present information on activities, events or public programs

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version was released with CUA Creative Arts and Culture Training Package Version 4.1. Minor edit to Application statement. |
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to prepare and present information on activities, events or public programs to different customer groups. The unit involves integrating effective interpretation and communication techniques into an engaging presentation and delivering it according to established guidelines.

It applies to individuals who present information on activities, events or public programs. It applies in a broad range of industry contexts.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cultural services - exhibitions and visitor programs

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan delivery of | 1.1 Confirm details of activity, event or public program with relevant |

| ELEMENT | PERFORMANCE CRITERIA |
|-------------------------|--|
| information | personnel 1.2 Plan delivery sequence and method to achieve objectives 1.3 Prepare facilities, resources and support materials for presentation delivery |
| 2. Prepare presentation | 2.1 Produce content for presentation, seeking expert advice on the subject matter where required 2.2 Identify appropriate presentation techniques to enhance audience engagement 2.3 Finalise presentation to meet objectives |
| 3. Deliver presentation | 3.1 Present accurate and relevant information in accordance with cultural and social sensitivities and organisational policies 3.2 Adjust presentation delivery according to audience, event or circumstance 3.3 Provide opportunities for audience participation 3.4 Identify problems and resolve or implement a contingency plan |
| 4. Evaluate feedback | 4.1 Seek formal or informal feedback from participants and colleagues according to organisational policies and procedures 4.2 Report attendance and participation information 4.3 Revise documentation incorporating feedback |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Checks completeness and accuracy of information Interprets a wide range of sources to identify and tailor relevant key information |
| Writing | <ul style="list-style-type: none"> Uses clear, specific and industry-related terminology to complete and update workplace documentation Prepares information for presentation and evaluation purposes using language, format and style appropriate to the audience and purpose |
| Oral communication | <ul style="list-style-type: none"> Participates in a verbal exchange of ideas/solutions and uses detailed and clear language to clarify and present information according to |

| | |
|----------------------------|---|
| n | requirements and audience <ul style="list-style-type: none"> • Uses a range of verbal responses and makes adjustments according to audience reactions |
| Numeracy | <ul style="list-style-type: none"> • Uses basic arithmetic to calculate timing and duration of presentation and participation data |
| Navigate the world of work | <ul style="list-style-type: none"> • Takes personal responsibility for following explicit and implicit policies and procedures • Accepts responsibility for and ownership of tasks |
| Interact with others | <ul style="list-style-type: none"> • Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Adapts personal communication style to show respect for the opinions, values and particular needs of others • Works collaboratively with others |
| Get the work done | <ul style="list-style-type: none"> • Takes responsibility for planning and organising own workload to meet deadlines • Determines job resources and equipment and works logically and systematically to undertake clearly defined and familiar tasks • Accepts responsibility for addressing less predictable problems and responds intuitively to those requiring immediate resolution • Applies analytical and lateral thinking to the process of creating effective presentation material and activities • Uses the main features and functions of digital tools to complete work tasks and present information in effective ways |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---------------------------------------|--------------------|
| CUA EVP411 Present information on activities, events or public programs (Release 2) | CUA EVP411 Present information on activities, events or public programs (Release 1) | Minor edits to Application statement. | Equivalent Unit |

Links

Companion Volumes are available from VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

Assessment Requirements for CUA EVP411 Present information on activities, events or public programs

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This version was released with CUA Creative Arts and Culture Training Package Version 4.1. Minor edit to Application statement. |
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements and performance criteria of this unit; including evidence of the ability to:

- deliver information on activities, events or public programs through an engaging presentation meeting the set objectives
- use and adapt a range of interpretation and presentation techniques to present information that meets the various needs of different audiences, including those with special needs
- engage audiences during the delivery of a presentation
- identify and resolve problems or implement contingency plans during presentations
- obtain and respond to formal and informal participant feedback.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes:

- sources of expert advice on the relevant subject matter
- key features of policies, procedures and practices relating to the provision of public activities, events or programs
- appropriate communication techniques and language to present to people from a broad range of backgrounds, cross-cultural groups and people with disabilities

- presentation techniques that could be used with a range of customer groups
- resources required for delivery of activities relevant to the workplace context.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a creative arts working environment or workplace. This includes access to:

- an activity, event or public program in a venue or site where information must be delivered
- an opportunity to present to and interact with a customer group of a size and nature that reflects a typical work environment
- technology, software and consumables required to access information and develop presentations

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volumes are available from VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

CUAIND202 Develop and apply knowledge of information and cultural services organisations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package version 2.0. |

Application

This unit describes the skills and knowledge required to source, update and maintain knowledge of information or cultural services organisations.

It applies to individuals who provide a support role in organisations such as libraries, information services, galleries, museums, archives or records management.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Industry capability - industry context

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Source and collect information | 1.1 Locate information, using relevant sources and within required timeframes, on the different types of information and cultural services 1.2 Identify key organisations and collect information about the role and key services they provide seeking the support of relevant personnel where required 1.3 Identify other industries with which information and cultural services may have a relationship |

| ELEMENT | PERFORMANCE CRITERIA |
|------------------------------------|--|
| | 1.4 Organise collected information |
| 2. Update and maintain information | <p>2.1 Review industry information on an ongoing basis to ensure currency</p> <p>2.2 Identify trends and emerging technologies relevant to information and cultural services sectors</p> <p>2.3 Locate key information on employment and volunteer opportunities and conditions in information and cultural services and share with colleagues</p> |
| 3. Finalise process | <p>3.1 Store collected and updated information in an easily accessible and retrievable format</p> <p>3.2 Apply collected information to job role or when seeking employment opportunities</p> <p>3.3 Seek feedback on information gathering process and note areas for future improvement</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|-------------------------|---|
| Reading | 1.1, 1.2, 1.4, 2.2, 2.3 | <ul style="list-style-type: none"> Identifies the main points in information about opportunities, conditions or requirements Interprets information to identify possible links to own information needs |
| Writing | 1.2, 1.3 | <ul style="list-style-type: none"> Records routine content using required formats and clear language Updates and maintains workplace files according to requirements |
| Oral Communication | 1.2, 2.4 | <ul style="list-style-type: none"> Participates in straightforward discussions regarding information, using appropriate vocabulary and style Confirms instructions and asks questions to elicit information |
| Navigate the world of work | 3.2 | <ul style="list-style-type: none"> Identifies skill and knowledge requirements for current or potential job roles |
| Interact with | 1.2, 2.3, 2.4 | <ul style="list-style-type: none"> Initiates interactions with others and responds |

| | | |
|-------------------|--|---|
| others | | appropriately <ul style="list-style-type: none"> Contributes to work discussions using accepted conventions |
| Get the work done | 1.1, 1.3, 1.4, 2.1, 2.2, 2.3, 3.1, 3.2 | <ul style="list-style-type: none"> Plans and implements routine tasks and own workload making limited decisions on sequencing, timing and collaboration Uses digital technology for basic reading, recording and searching information, and for communications following routine procedures |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| CUAIND202 Develop and apply knowledge of information and cultural services organisations | CULIND201A Develop and apply knowledge of information and cultural services | Updated to meet Standards for Training Packages and clarify intent. Change to unit title. Minor edits to elements and performance criteria. | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

Assessment Requirements for CUAIND202 Develop and apply knowledge of information and cultural services organisations

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package version 2.0. |

Performance Evidence

Evidence of the ability to:

- locate and organise key information about the role and main services of organisations providing information and cultural services
- access and retrieve collected information and use it in a job role or to seek employment in the field.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- identify information and cultural services organisations and outline their main role in communities
- identify roles in selected information and cultural services organisations and describe skills and knowledge required
- outline typical working conditions in information and cultural services organisations.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- a range of current industry information sources
- appropriate technology to research and apply industry information.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

CUAPRE401 Implement preventive conservation activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package version 2.0. |

Application

This unit describes the skills and knowledge required to provide preventive care of collection material through a sound knowledge of conservation principles, practices and ethics.

It applies to individuals who apply their skills in organisations responsible for the care of cultural material, including archives, museums, libraries, galleries and cultural centres. They monitor environmental conditions, assess the condition of collection material and take action to conserve it.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Cultural services - preventive conservation

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Monitor environmental conditions | 1.1 Monitor environmental conditions according to collection needs and identify agents of deterioration affecting collection material 1.2 Control and adjust environmental conditions within scope of own role 1.3 Report serious or complex problems to relevant colleagues |
| 2. Assess condition of | 2.1 Examine and assess condition of collection material in the |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| collection material | <p>appropriate location, applying knowledge of deterioration patterns</p> <p>2.2 Review documentation and record current condition of collection items</p> <p>2.3 Consult experts for advice where necessary</p> |
| 3. Undertake preventive conservation | <p>3.1 Implement preventive conservation activities according to organisational policies and procedures and within required timeframes</p> <p>3.2 Research and apply best practice guidelines, cultural protocols, updated knowledge of preservation issues and techniques, and specialist conservation advice</p> <p>3.3 Identify the need for assistance and consult with a specialist conservator in relation to more complex issues that arise in collection care</p> |
| 4. Finalise basic preservation activities | <p>4.1 Ensure conserved collection material is returned to original location where required</p> <p>4.2 Communicate conservation activity and any associated learnings with colleagues</p> <p>4.3 Complete records of preservation and preventive conservation activities in an appropriate format</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|--------------------|----------------------|--|
| Reading | 2.2, 3.1, 3.2 | <ul style="list-style-type: none"> Critically analyses documentation from a variety of sources to determine requirements and appropriate approaches |
| Writing | 1.3, 2.2, 4.3 | <ul style="list-style-type: none"> Completes relevant documentation using clear and technically specific language and terminology that succinctly communicates relevant information |
| Oral communication | 1.3, 2.3, 3.3, 4.2 | <ul style="list-style-type: none"> Effectively participates in verbal exchanges using active listening and questioning to clarify and confirm information |
| Navigate the | 2.3, 3.1, 3.2, 3.3 | <ul style="list-style-type: none"> Accepts responsibility and ownership for tasks and |

| | | |
|----------------------|---|--|
| world of work | | <p>makes decisions on completion parameters and the need for coordination with others</p> <ul style="list-style-type: none"> Ensures knowledge of preservation and conservation issues relevant to own role is accurate, comprehensive and current Follows organisational procedures and protocols |
| Interact with others | 1.3, 2.3, 3.3, 4.2 | <ul style="list-style-type: none"> Collaborates and cooperates with others to achieve joint outcomes |
| Get the work done | 1.1, 1.2, 1.3, 2.1, 2.2, 3.1, 3.2, 3.3, 4.1 | <ul style="list-style-type: none"> Determines job sequence and works logically and systematically to undertake clearly defined tasks Makes decisions directly related to job role, seeking assistance when required Uses digital tools to complete work tasks and access information |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| CUAPRE401 Implement preventive conservation activities | CULPRE401A Implement preventive conservation activities | Updated to meet Standards for Training Packages and clarify intent. Minor edits to elements and performance criteria. | Equivalent Unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

Assessment Requirements for CUAPRE401 Implement preventive conservation activities

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with CUA Creative Arts and Culture Training Package version 2.0. |

Performance Evidence

Evidence of the ability to:

- identify changes in the condition of collection material and take appropriate routine preventive action to protect collection material from damage and potential hazards and to conserve material
- identify agents of deterioration and assess their impact on collections in a timely manner
- apply basic conservation techniques and methods that reflect current industry methods when handling equipment, tools and materials during routine examination and conservation of collection material
- demonstrate a collaborative approach to the discussion of issues, new techniques and current approaches to conservation
- record and report preservation and preventive conservation activities.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe the roles of personnel responsible for care of cultural material, including the roles of conservators and unqualified personnel
- identify sources of expert assistance on collection care
- describe the role of preventive conservation in relation to collections
- describe the critical factors contributing to deterioration of collections
- clarify the distinction between preservation, conservation and restoration
- discuss the application of cultural considerations and protocols for the handling, storage and display of collection material
- describe methods of protecting collection material from damage and potential hazards.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in creative arts industry environments. The assessment environment must include access to:

- relevant policies and procedures
- cultural material in an appropriate environment
- equipment, tools and materials for preventive conservation and basic preservation activities.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational educational and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=1db201d9-4006-4430-839f-382ef6b803d5>

DEFEVL001 Develop an evaluation program

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in DEF Defence Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to DEFEV501 Develop an evaluation program.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice• All PC revised in element 3 |

Application

This unit describes the skills required to develop an evaluation program for an organisation. It includes defining terms of reference and context; identifying key stages and outcomes; assessing and defining data management requirements and identifying the resources needed to undertake the program.

This unit applies to those responsible for the design and development of an evaluation and reporting strategy to measure performance and the value of investment decisions.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks in a familiar context.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Evaluation

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Define terms of reference & evaluation context | 1.1 Identify and clarify the outcomes sought, who will use the information and for what purpose. 1.2 Identify the key stakeholders who will be consulted. 1.3 Select evaluation and monitoring methods which are suitable to the size and significance of the program, and the terms of reference. 1.4 Complete a review of existing evidence and literature relevant to the proposed evaluation. 1.5 Develop an evaluation methodology that supports broader management targets, standards, and outputs. |
| 2. Identify the key stages and outcomes of the program | 2.1 Define key stages, milestones and timeframe. 2.2 Communicate with clients and stakeholders the details of the program and delivery timeline for endorsement. 2.3 Identify potential risks which may impact on the proposed program. 2.4 Refine targets and objectives as required. |
| 3. Define reporting and record keeping requirements for data management | 3.1 Identify data collection, management and reporting requirements to meet the objectives of the program. 3.2 Identify existing data sets that may be accessed for the program. 3.3 Design data collection protocols to meet relevant standards and required formats. 3.4 Store data to ensure security and appropriate access taking into account required formats. 3.5 Identify the information products required taking into account clients and stakeholders' needs and use. 3.6 Produce reports to suit program audience types. |
| 4. Identify the resources needed to implement the program | 4.1 Identify the personnel and skills required to implement the monitoring and evaluation program. 4.2 Assess the material resources required to undertake the work. 4.3 Determine the cost of the program and develop a budget. |

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

ACSF levels indicative of performance:

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

This unit supersedes and is equivalent to DEFEV501 Develop an evaluation program.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Assessment Requirements for DEFEVL001 Develop an evaluation program

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in DEF Defence Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- scoping and reviewing a program
- collecting and managing data
- budgeting and identifying program costs
- planning evaluation programs
- using literacy skills to fulfil job roles as required by the organisation
- reading and understanding documentation
- completing written reports
- using oral communication skills/language competence to fulfil the job role
- questioning
- active listening
- asking for clarification
- negotiating solutions
- responding to a range of views
- using numeracy skills to estimate, calculate and record complex workplace measures
- using interpersonal skills to work with others and relate to people from a range of cultural, social and religious backgrounds and with a range of physical and mental abilities
- defining terms of reference and context
- identifying key stages and outcomes
- assessing and defining data management requirements
- identifying the resources needed to undertake the program

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- program design considerations (cost, equality, technically valid, ethics)
- quantitative and qualitative methods for monitoring and evaluation
- data management

Assessment Conditions

Competency should be assessed in an actual workplace or in a simulated environment, with access to equipment and infrastructure appropriate to the outcome. Competency should be demonstrated over time to ensure the candidate is assessed across a variety of situations.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

DEFEVL002 Evaluate and report collected information

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in DEF Defence Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to DEFEV502 Evaluate and report collected information.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice• PC added in element 2 |

Application

This unit describes the skills required to apply diagnostic and mathematical skills to determine validity and appropriateness of collected data.

This unit applies to those working on evaluation programs.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks in a familiar context.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Evaluation

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Determine whether data is covered by scope of program | 1.1 Collect evidence, facts and information. 1.2 Review evaluation terms of reference and conditions to determine whether data/information falls within project scope. |
| 2. Apply and analyse established data | 2.1 Assess validity of data/information. 2.2 Apply analysis techniques to assess data. 2.3 Identify trends and anomalies. 2.4 Document data analysis techniques and procedures. 2.5 Make recommendations on areas of possible improvement. |
| 3. Record data analysis | 3.1 Record findings. 3.2 Analyse recommendations for action to ensure they are compatible with the project's scope and terms of reference. 3.3 Analyse interim and final reports and compare outcomes to the criteria established at the outset. 3.4 Report findings to stakeholders. |

Foundation Skills

FOUNDATION SKILLS

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

ACSF levels indicative of performance:

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

This unit supersedes and is equivalent to DEFEV502 Evaluate and report collected information.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Assessment Requirements for DEFEVL002 Evaluate and report collected information

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in DEF Defence Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least two occasions.

- paying attention to detail
- communicating facts in a fluent, clear manner
- researching information
- gathering, measuring and managing data
- planning and analysing
- negotiating and problem solving
- using a range of communication styles for communicating with different audiences and purposes
- applying sustainability principles

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- organisational protocols relating to client liaison
- confidentiality
- accuracy
- business mathematics and statistics
- data analysis techniques/procedures
- reporting requirements to a range of audiences
- legislation, policy and procedures relating to the conduct of evaluations

- organisational values, ethics and codes of conduct

Assessment Conditions

Competency should be assessed in an actual workplace or in a simulated environment, with access to equipment and infrastructure appropriate to the outcome. Competency should be demonstrated over time to ensure the candidate is assessed across a variety of situations.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

DEFEVL003 Maintain and enhance professional practice

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in DEF Defence Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to DEFEV503 Maintain and enhance professional practice.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to manage personal professional performance and to take responsibility for professional development in relation to the provision of evaluation services.

This unit applies to those working in an evaluation environment.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks in a familiar context

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Evaluation

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Model high standards of performance | 1.1 Incorporate individual responsibilities and accountabilities into personal work plans. 1.2 Model professional techniques and strategies. 1.3 Apply ethical and inclusive practices in professional practice. |
| 2. Determine personal development needs | 2.1 Assess own knowledge and skills against relevant benchmarks to determine development needs and priorities. 2.2 Seek input from other relevant personnel about own development needs and priorities. 2.3 Identify ways to update and maintain currency of evaluation practices and prepare a vocational training plan. 2.4 Combine vocational training plan and personal development objectives into an overall professional development plan. |
| 3. Participate in professional development activities | 3.1 Select and implement development opportunities to support continuous learning and maintain currency of professional practice. 3.2 Participate in professional networks to support continuous learning and maintain currency of professional practice. 3.3 Engage in processes which include observing peers and providing them with feedback. 3.4 Invite peers and others to observe and provide feedback on own practices. 3.5 Use technology to maintain regular communication with relevant networks, organisations and individuals. |
| 4. Reflect on and evaluate professional practice | 4.1 Research developments and trends impacting on professional practice and integrate information into work performance. 4.2 Use feedback from colleagues and clients to identify and introduce improvements in work performance. 4.3 Document professional development activities, learning and planned changes in behaviours. |

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

ACSF levels indicative of performance:

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

This unit supersedes and is equivalent to DEFEV503 Maintain and enhance professional practice.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Assessment Requirements for DEFEVL003 Maintain and enhance professional practice

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in DEF Defence Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none"> Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least two occasions.

- participating in professional networks
- consulting with colleagues and clients
- demonstrating interpersonal skills
- engaging with peers professionally to give and receive feedback
- making informed decisions and recommendations
- completing and maintaining records related to professional development
- evaluating personal work practices to improve performance or understanding
- keeping up with trends, changes and developments in own area of speciality
- analysing and identifying opportunities to improve training and assessment practices
- demonstrating time management skills
- contributing to own professional development plan
- networking and using technology to gain information and other support
- participating in professional development activities

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- organisational goals and objectives
- organisational processes, procedures and opportunities relating to professional development

- continuous improvement techniques and processes and their application
- social and education trends and changes impacting on the evaluation environment, including:
 - policy changes
 - technological changes
 - cultural changes
 - economic changes
- networks relevant to professional practice
- ethical and inclusive principles and practices associated with assessment of competence
- types and availability of development activities and opportunities

Assessment Conditions

Competency should be assessed in an actual workplace or in a simulated environment, with access to equipment and infrastructure appropriate to the outcome. Competency should be demonstrated over time to ensure the candidate is assessed across a variety of situations.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

DEFEVL004 Evaluate a training and assessment system

Modification History

| Release | Comments |
|---------|---|
| 1 | This unit was released in DEF Defence Training Package release 1.0 and meets the Standards for Training Packages. |

Application

This unit describes the skills required to evaluate an external or internal training and assessment system.

This unit applies to those who have responsibility for evaluating training and assessment strategies of an organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks in a familiar context.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Evaluation

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |

| | |
|---|--|
| 1. Plan a system evaluation | <p>1.1 Identify and confirm the purpose and role of the evaluation with client and stakeholders.</p> <p>1.2 Define the system in terms of location, purpose, and personnel.</p> <p>1.3 Identify and prioritise the needs of the stakeholders of the system.</p> <p>1.4 Identify, obtain and develop the necessary evaluation resources.</p> <p>1.5 Validate the evaluation plan with stakeholders including:</p> <ul style="list-style-type: none"> • methodology • responsibility of appropriate personnel for conducting and participating in evaluations • criteria • responsibilities for implementation of the evaluation plans • means of protection of participants • agreement for data collection, storage and retrieval • procedures for editing and disseminating reports • agreement of the financing <p>1.6 Establish the evidence required for making decisions of system improvement.</p> <p>1.7 Identify, develop and assess validity and reliability of evidence gathering instruments, procedures and sources of information.</p> <p>1.8 Link cost effective methods utilising an appropriate evaluation model to the purpose of the evaluation.</p> |
| 2. Conduct the evaluation | <p>2.1 Collect evidence in accordance with agreed evaluation procedures.</p> <p>2.2 Identify and record potentially useful information which is not identified in the evaluation plan.</p> <p>2.3 Collate and process data relevant to the evaluation.</p> <p>2.4 Interpret evidence at the individual and aggregate levels and identify strengths and weaknesses of the system.</p> |
| 3. Report on evaluation findings | <p>3.1 Document issues and conclusions arising from the analysis conducted.</p> <p>3.2 Make recommendations to stakeholders on areas of possible improvement.</p> <p>3.3 Discuss preliminary findings with stakeholders.</p> <p>3.4 Prepare a range of reports to meet the differing needs of stakeholders.</p> |

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

ACSF levels indicative of performance:

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Assessment Requirements for DEFEVL004 Evaluate a training and assessment system

Modification History

| Release | Comments |
|---------|---|
| 1 | These Assessment Requirements were released in DEF Defence Training Package release 1.0 and meet the Standards for Training Packages. |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- evaluating information management systems, policies and procedures of an organisation
- selecting relevant evaluation information and documentation
- accessing and interpreting the organisation's standards and values
- analysing records/notes of the evaluation process
- explaining the evaluation process
- giving clear and precise instructions and advice
- discussing the evaluation process with other relevant people
- seeking information relevant to the evaluation
- discussing the evaluation outcome with the stakeholders
- interpreting training program requirements
- developing resources to support the evaluation process
- communicating with key stakeholders
- producing and maintaining documentation
- planning projects, work programs
- coordinating the work of self and others
- investigating training and workforce data
- determining and implementing improvement
- writing evaluation reports

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- program design considerations (cost, equality, technically valid, ethics)

- quantitative and qualitative methods for monitoring and evaluation
- data management
- Training Packages and accredited courses, and what comprises quality training and assessment services
- how training and/or assessment organisations operate
- terminology relating to quality evaluation processes
- evaluation models/methods
- records management systems of the organisation
- relevant policy, legislation, codes of practice and national standards, including Commonwealth and state/territory legislation
- vocational education and training systems
- WHS relating to planning and conducting an evaluation
- vocational education regulations

Assessment Conditions

Competency should be assessed in an actual workplace or in a simulated environment, with access to equipment and infrastructure appropriate to the outcome. Competency should be demonstrated over time to ensure the candidate is assessed across a variety of situations.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

DEFEVL005 Evaluate a community based program

Modification History

| Release | Comments |
|---------|---|
| 1 | This unit was released in DEF Defence Training Package release 1.0 and meets the Standards for Training Packages. |

Application

This unit describes the skills required to evaluate an external or internal community based program.

This unit applies to those who have responsibility for evaluating community based programs of an organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks in a familiar context.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Evaluation

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Monitor | 1.1 Monitor program activities to ensure they are delivered in |

| | |
|---|---|
| performance of a community based program | <p>accordance with contract and/or Service Level Agreement.</p> <p>1.2 Review results of monitoring regularly.</p> |
| 2. Plan an evaluation | <p>2.1 Identify and confirm the purpose and role of the evaluation.</p> <p>2.2 Identify and prioritise the needs of the stakeholders of the program.</p> <p>2.3 Identify, obtain and develop the necessary evaluation resources.</p> <p>2.4 Validate the evaluation plan with stakeholders including:</p> <ul style="list-style-type: none"> • methodology • responsibility of appropriate personnel for conducting and participating in evaluations • criteria • responsibilities for implementation of the evaluation plans • means of protection of participants • agreement for data collection, storage and retrieval • procedures for editing and disseminating reports • agreement of the financing <p>2.5 Identify, develop and assess validity and reliability of evidence gathering instruments, procedures and sources of information.</p> |
| 3. Conduct the evaluation | <p>3.1 Collect evidence in accordance with agreed evaluation plan.</p> <p>3.2 Identify and record potentially useful information which is not identified in the evaluation plan.</p> <p>3.3 Collate and process data relevant to the evaluation.</p> |
| 4. Report on evaluation findings | <p>4.1 Document issues and conclusions arising from the analysis conducted.</p> <p>4.2 Make recommendations to stakeholders on areas of possible improvement.</p> <p>4.3 Discuss preliminary findings with stakeholders.</p> <p>4.4 Prepare a range of reports to meet the differing needs of stakeholders.</p> |

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

ACSF levels indicative of performance:

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Assessment Requirements for DEFEVL005 Evaluate a community based program

Modification History

| Release | Comments |
|---------|---|
| 1 | These Assessment Requirements were released in DEF Defence Training Package release 1.0 and meet the Standards for Training Packages. |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- selecting relevant evaluation information and documentation
- accessing and interpreting the organisation's standards and values
- analysing records/notes of the evaluation process
- explaining the evaluation process
- giving clear and precise instructions and advice
- discussing the evaluation process with other relevant people
- seeking information relevant to the evaluation
- discussing the evaluation outcome with the stakeholders
- interpreting contract requirements
- developing resources to support the evaluation process
- communicating with key stakeholders
- producing and maintaining documentation
- planning projects, work programs
- coordinating the work of self and others
- investigating training and workforce data
- determining and implementing improvement
- writing evaluation reports

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- access and equity issues of community based population

- quantitative and qualitative methods for monitoring and evaluation
- data management
- what comprises quality community based services
- how community based organisations operate
- terminology relating to quality evaluation processes
- evaluation models/methods
- evidence-based practice
- records management systems of the organisation
- relevant policy, legislation, codes of practice and national standards, including Commonwealth and state/territory legislation
- WHS relating to planning and conducting an evaluation

Assessment Conditions

Competency should be assessed in an actual workplace or in a simulated environment, with access to equipment and infrastructure appropriate to the outcome. Competency should be demonstrated over time to ensure the candidate is assessed across a variety of situations.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

DEFEVL006 Evaluate business performance

Modification History

| Release | Comments |
|---------|---|
| 1 | This unit was released in DEF Defence Training Package release 1.0 and meets the Standards for Training Packages. |

Application

This unit describes the skills required to evaluate the performance of an organisation's business operations.

This unit applies to those who have responsibility for evaluating the business performance of an organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks in a familiar context.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Evaluation

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Plan an | 1.1 Identify and confirm the purpose of the evaluation with client and |

| | |
|--|---|
| evaluation | <p>stakeholders.</p> <p>1.2 Identify and prioritise the needs of the stakeholders.</p> <p>1.3 Identify, obtain and develop the necessary resources.</p> <p>1.4 Validate the evaluation plan with stakeholders including:</p> <ul style="list-style-type: none"> • methodology • responsibility of appropriate personnel for conducting and participating in evaluations • performance indicators • agreement for data collection, storage and retrieval • procedures for editing and disseminating reports • agreement of the financing <p>1.5 Identify, develop and assess validity and reliability of evidence gathering instruments, procedures and sources of information.</p> <p>1.6 Link cost effective methods utilising an appropriate evaluation model to the purpose of the evaluation.</p> |
| 2. Develop performance indicators | <p>2.1 Develop performance indicators that link programs, processes and resource use to organisational strategic objectives and/or environmental factors.</p> <p>2.2 Develop performance indicators using processes that are planned, inclusive and realistic within available time frames and resources.</p> |
| 3. Conduct the evaluation | <p>3.1 Gather and analyse program and organisational data to identify past, current and future performance.</p> <p>3.2 Identify and record potentially useful information which is not identified in the evaluation plan.</p> <p>3.3 Collate and process data relevant to the evaluation.</p> <p>3.4 Research and evaluate variations from targets and divergences from trends to determine margins of error and/or repeating patterns.</p> <p>3.5 Assess trends in performance in terms of organisational short and long term objectives.</p> |
| 4. Identify options for improvement | <p>4.1 Identify factors inhibiting performance.</p> <p>4.2 Review organisational program to include factors that promote performance in line with available resources.</p> |
| 5. Report on evaluation findings | <p>5.1 Document issues and conclusions arising from the analysis conducted.</p> <p>5.2 Make recommendations to stakeholders on areas of possible improvement.</p> <p>5.3 Discuss preliminary findings with stakeholders.</p> <p>5.4 Prepare a range of reports to meet the differing needs of stakeholders.</p> |

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

ACSF Levels essential to performance:

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Assessment Requirements for DEFEVL006 Evaluate business performance

Modification History

| Release | Comments |
|---------|---|
| 1 | These Assessment Requirements were released in DEF Defence Training Package release 1.0 and meet the Standards for Training Packages. |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- evaluating information management systems, policies and procedures of an organisation
- selecting relevant evaluation information and documentation
- accessing and interpreting the organisation's standards, missions, values and objectives
- analysing records/notes of the evaluation process
- explaining the evaluation process
- giving clear and precise instructions and advice
- discussing the evaluation process with other relevant people
- seeking information relevant to the evaluation
- discussing the evaluation outcome with the stakeholders
- developing resources to support the evaluation process
- communicating with key stakeholders
- producing and maintaining documentation
- planning projects, work programs
- coordinating the work of self and others
- investigating training and workforce data
- determining and implementing improvement
- writing evaluation reports
- analysing trend
- creating performance indicators

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- program design considerations (cost, equality, technically valid, ethics)
- quantitative and qualitative methods for monitoring and evaluation
- data management
- ethical considerations
- organisational structures and lines of management authority
- terminology relating to quality evaluation processes
- evaluation models/methods
- records management systems of the organisation
- relevant policy, legislation, codes of practice and national standards, including Commonwealth and state/territory legislation
- business and Human Resource models
- WHS relating to planning and conducting an evaluation

Assessment Conditions

Competency should be assessed in an actual workplace or in a simulated environment, with access to equipment and infrastructure appropriate to the outcome. Competency should be demonstrated over time to ensure the candidate is assessed across a variety of situations.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>

FNSACC312 Administer subsidiary accounts and ledgers

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to reconcile and monitor subsidiary accounts in financial accounts receivable systems, identify bad and doubtful debts and plan a recovery action, record creditor invoices, and remit payments to sundry creditors.

It applies to individuals who use specialised knowledge and follow agreed processes to problem solve within the scope of own responsibility.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the FNS Financial Services Training Package Companion Volume Implementation Guide or the relevant regulator for specific guidance on regulatory requirements.

Unit Sector

Accounting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review accounts receivable requirements | <p>1.1 Check receipts entered into manual accounts receivable system for accuracy, consistency and completeness</p> <p>1.2 Identify and make record of incorrect entries according to type and source of receipt</p> <p>1.3 Identify and investigate discrepancies between monies owed and monies paid according to organisational policies, procedures and guidelines</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 1.4 Amend receipts entered into manual accounts receivable system according to established procedures |
| 2. Identify bad and doubtful debts | <p>2.1 Review debtor ledger according to organisational policies and guidelines to identify outstanding monies and seek further information where required</p> <p>2.2 Verify bad and doubtful debt status through liaison with debtors</p> <p>2.3 Complete reporting procedures and required documentation for bad and doubtful debts according to organisational policies and guidelines</p> |
| 3. Review client compliance with terms and conditions and plan recovery action | <p>3.1 Identify clients in default of trading terms according to organisational credit policies and operating procedures</p> <p>3.2 Contact identified clients and promptly and courteously make satisfactory arrangements for payment of outstanding monies</p> <p>3.3 Action organisational policy and procedures for monies owing that constitute breach of organisational credit policy</p> <p>3.4 Review previous activities and communication with clients to establish adequacy of follow-up procedures, and determine whether usual organisational recovery avenues have been exhausted</p> <p>3.5 Develop plans to pursue debt recovery or to initiate legal action, with measures completed in line with organisational policies, guidelines and timeframes</p> |
| 4. Prepare reports and file documentation | <p>4.1 Prepare reports that document accounts receivable, debt recovery type and cause, and debt recovery plan</p> <p>4.2 Distribute reports to supervisors, managers, and other designated parties</p> <p>4.3 File documentation according to organisational policy and procedures</p> |
| 5. Distribute creditor invoices for authorisation | <p>5.1 Identify, investigate and rectify invoice discrepancies and encode and record invoices correctly</p> <p>5.2 Request authorisation for payment from designated personnel</p> |
| 6. Remit payments to creditors | <p>6.1 Draw up and ensure authorisation of cheque requisition</p> <p>6.2 Collect and record data relating to creditor details and amounts paid according to organisational guidelines, and prepare report for ratification by management</p> <p>6.3 Prepare creditor payment in line with organisational</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|--|
| | requirements 6.4 Prepare journal to record payment |
| 7. Reconcile outstanding balances | 7.1 Obtain statements of outstanding balances from suppliers where required 7.2 Reconcile balances outstanding to invoices received |

Foundation Skills

This section describes those language, literacy and numeracy and employment skills that are essential to performance.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Analyses discrepancies and errors |
| Writing | <ul style="list-style-type: none"> Records information using correct spelling, grammar and terminology Prepares reports of consolidated information and correspondence using logical structure and organisational formats |
| Oral communication | <ul style="list-style-type: none"> Participates in verbal exchanges with a range of personnel and uses questioning and active listening to convey and clarify information and instructions |
| Numeracy | <ul style="list-style-type: none"> Performs mathematical calculations to check accuracy and completeness of numerical and financial data, with a focus on identifying errors and discrepancies |
| Navigate the world of work | <ul style="list-style-type: none"> Follows organisational protocols, policies and procedures relevant to own role |
| Interact with others | <ul style="list-style-type: none"> Follows accepted communication practices and protocols to liaise with others, elicit and share information, and gain required authorisations |
| Get the work done | <ul style="list-style-type: none"> Plans, organises and implements tasks according to organisational requirements Responds to predictable problems about payment status or discrepancies by implementing standard, logical solutions Uses the main features and functions of digital tools to complete work tasks and to access information |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| FNSACC312 Administer subsidiary accounts and ledgers (Release 1) | FNSACC302 Administer subsidiary accounts and ledgers (Release 1) | Updates to elements, performance criteria and assessment requirements. | Equivalent unit. |

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSACC312 Administer subsidiary accounts and ledgers

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- reconcile and monitor subsidiary accounts according to industry compliance requirements and organisational policies and procedures, including:
 - using required data entry and reporting systems to perform account and ledger administration activities
 - following organisational data validation and reconciliation processes and analysing outcomes of the reconciliation for required actions
 - identifying bad and doubtful debts in a timely manner
 - planning effective debt recovery actions.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of debits and credits, and their role in accounting systems
- Procedures for identifying bad or doubtful debts
- Key requirements relating to the administration of subsidiary accounts and ledgers detailed in:
 - legal systems, regulations and procedures
 - industry codes of practice
- Key requirements of organisational policies and procedures relating to reconciling and monitoring financial accounts, including organisational credit policy

- Industry-accepted measures and protocols to remit and collect monies
- Key features of debt recovery plans
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the accounting field of work and include access to:

- office equipment, technology, software and consumables required to reconcile and monitor accounts receivable data systems.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSACC411 Process business tax requirements

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to maintain business taxation accounting records, and to process lodgements and returns according to Australian Taxation Office (ATO) requirements, excluding income tax. Documentation for business activity statements (BAS) must be authorised by a registered BAS agent.

It applies to individuals who use specialised knowledge and follow defined procedures to administer and process taxation-related information within the scope of own responsibility.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the FNS Financial Services Training Package Companion Volume Implementation Guide or the relevant regulator for specific guidance on regulatory requirements.

Unit Sector

Accounting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Maintain accounting records for taxation purposes | 1.1 Access and interpret taxation accounting system requirements specific to own role 1.2 Establish and maintain records required to support taxation accounting system 1.3 Comply with specific taxation requirements for business documents |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| 2. Establish and maintain process for managing business tax returns | 2.1 Establish accounting process to manage process for taxation lodgements 2.2 Maintain sufficient and current records to comply with lodgement requirements according to organisational policies and procedures 2.3 Establish and meet lodgement schedule requirements |
| 3. Process business tax returns and lodgements | 3.1 Identify and use required returns and lodgements in line with organisational procedures 3.2 Process accounting data to comply with taxation reporting requirements 3.3 Draft returns and lodgements for review by authorised personnel |

Foundation Skills

This section describes those language, literacy and numeracy and employment skills that are essential to performance.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Interprets documentation from a variety of sources and records, gathers, and consolidates financial information |
| Writing | <ul style="list-style-type: none"> Records information accurately using correct spelling, grammar and terminology Drafts text and prepares numerical information for reports and forms |
| Numeracy | <ul style="list-style-type: none"> Performs mathematical calculations accurately and interprets and analyses financial data to achieve requirements |
| Navigate the world of work | <ul style="list-style-type: none"> Identifies and complies with regulatory requirements, protocols, policies and procedures relevant to own role |
| Get the work done | <ul style="list-style-type: none"> Plans, organises and implements efficient systems to meet business tax requirements Organises work tasks according to defined requirements, taking responsibility for process and schedule needs Uses analytical techniques to gather information and identify and evaluate options Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|--|---|--------------------|
| FNSACC411 Process business tax requirements (Release 1) | FNSACC401 Process business tax requirements (Release 1) | Minor edits to performance criteria to clarify intent of unit. | Equivalent unit. |

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSACC411 Process business tax requirements

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- maintain accounting records for taxation purposes
- establish and maintain an administrative process for managing business taxation returns, excluding income tax
- prepare and process business taxation returns using validated data according to Australian taxation requirements.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key requirements of Australian Taxation Office (ATO) and legislation relating to business taxation returns
- Accounting terminology used when processing business taxation requirements, including terminology found in:
 - business activity statements
 - fringe benefits tax (FBT)
 - pay as you go (PAYG) tax
 - company tax
 - wine equalisation tax
 - luxury car tax
 - payroll tax

- stamp duty
- Key ATO and organisational requirements for tax lodgement schedules
- Key administrative procedures in a financial services organisation or business unit relating to taxation accounting records, and lodgements and returns
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the accounting field of work and include access to:

- office equipment, technology, software and consumables required to process tax lodgements and returns, including:
 - return and lodgement templates
 - access to the internet.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSACC412 Prepare operational budgets

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to prepare and document operational budgets for a variety of organisations.

It applies to individuals who use specialised knowledge and systematic approaches to undertake strategic financial activity for an organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Accounting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare budget | 1.1 Confirm budget objectives are consistent with organisational aims, projects and forecasts 1.2 Define cash, expenditure and revenue items and ensure they are relevant to budget 1.3 Discuss and clarify identified budget information with stakeholders according to organisational procedures |
| 2. Set budget timeframe | 2.1 Identify, confirm and include milestones and performance indicators in budget 2.2 Break down annual budgets into seasonal periods according |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------|--|
| | to organisational operating procedures |
| 3. Document budget | 3.1 Present data in a clear format appropriate to budget reporting 3.2 Complete and distribute reports for specified periods and projects within agreed timeframes 3.3 Monitor budget variance and seek direction from client or designated person to address variance as required |

Foundation Skills

This section describes those language, literacy and numeracy and employment skills that are essential to performance.

| Skill | Description |
|----------------------|---|
| Reading | <ul style="list-style-type: none"> Analyses potentially complex information from a range of sources and relates specific aspects of information to budget requirements |
| Writing | <ul style="list-style-type: none"> Records financial information accurately Uses clear language and logical structure in preparing reports and presentations to convey information |
| Oral communication | <ul style="list-style-type: none"> Participates in verbal exchanges using active listening and questioning to elicit the views and opinions of others and to confirm requirements |
| Numeracy | <ul style="list-style-type: none"> Performs mathematical calculations and uses estimating and forecasting techniques to consolidate and analyse financial data |
| Interact with others | <ul style="list-style-type: none"> Builds rapport during discussions, collaborations and negotiations |
| Get the work done | <ul style="list-style-type: none"> Develops plans to manage and report on routine and non-routine tasks with logically sequenced steps Uses analytical processes to identify process milestones and performance indicators Uses digital systems and programs to assist with planning, implementing, monitoring and reporting budgets |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| FNSACC412 Prepare operational budgets (Release 1) | FNSACC402 Prepare operational budgets (Release 1) | Edits to performance criteria to clarify intent of unit. Added performance criterion to Element 3. | Equivalent unit. |

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSACC412 Prepare operational budgets

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- establish and confirm budgetary milestones and performance indicators
- collect financial data and prepare operational budgets for a range of organisations
- identify budget variances and report variances to designated stakeholders
- record and document budget reports.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key principles of budgetary control
- Range of forecasting techniques used when preparing operational budgets
- Key principles of statistical analysis and measures of variance in the context of financial data analysis and operational budgets
- Key features of organisational policies and procedures for financial administration as they relate to budgeting
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the accounting field of work and include access to:

- office equipment, technology, software and consumables required to prepare operational budgets, including:
 - digital systems and programs to assist in budget preparation and reporting
 - templates for presenting financial data.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSACC413 Make decisions in a legal context

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to make decisions, particularly those relating to compliance issues, in a legal context. It is intended to satisfy the requirement for a course of study in commercial law at an introductory or foundation level, covering Australian legal systems and processes.

It applies to individuals who, within the scope of own responsibility, use specialised knowledge to make decisions that require consideration of the legal context.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Accounting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Examine legal context of financial services work | 1.1 Identify key features of Australian legal systems and processes relating to own role 1.2 Identify functions of courts and other regulatory bodies relating to own role 1.3 Analyse implications of related legislation, regulations and legal precedents for operational decisions, and apply findings in decision-making process 1.4 Seek advice and guidance to evaluate and moderate |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | decision-making processes |
| 2. Identify compliance requirements of financial services work | <p>2.1 Interpret compliance requirements of own financial services work, and confirm interpretation with authoritative source relating to own role</p> <p>2.2 Review legislative and regulatory sources of information to identify changes to compliance requirements</p> <p>2.3 Analyse impact of changes to compliance requirements on business operations, policies and procedures</p> |
| 3. Develop compliance procedures | <p>3.1 Develop procedures in consultation with others to address compliance requirements</p> <p>3.2 Establish timeframes to meet compliance requirements to align with statutory deadlines</p> |

Foundation Skills

This section describes those language, literacy and numeracy and employment skills that are essential to performance.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> • Categorises, consolidates and interprets complex regulatory and legislative information relating to scope of own work |
| Writing | <ul style="list-style-type: none"> • Prepares documentation using clear language, formats and terminology specific to requirements, audience and purpose |
| Oral communication | <ul style="list-style-type: none"> • Participates in verbal exchanges using active listening and questioning to clarify thinking and elicit opinions of others |
| Navigate the world of work | <ul style="list-style-type: none"> • Contributes to the development of procedures to meet legislative requirements • Identifies organisational implications of new or changed legislation or regulations |
| Interact with others | <ul style="list-style-type: none"> • Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to seek or share information • Collaborates and cooperates with others to achieve joint outcomes |
| Get the work done | <ul style="list-style-type: none"> • Organises work to meet organisational requirements, taking responsibility for process, compliance and schedule needs • Makes critical and non-critical decisions in relatively complex |

| Skill | Description |
|-------|--|
| | <p>situations, taking related legislation, regulations, and legal precedents into consideration</p> <ul style="list-style-type: none">• Uses the main features and functions of digital tools to complete work tasks |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| FNSACC413 Make decisions in a legal context (Release 1) | FNSACC403 Make decisions in a legal context (Release 1) | Edits to performance criteria to clarify their intent. Added performance criterion to Element 2. Expanded knowledge evidence. | Equivalent unit. |

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSACC413 Make decisions in a legal context

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- access information on legislation, statutes, regulations, and legal precedents related to operational decisions
- interpret impact of legislation, statutes, regulations and legal precedents on operational decisions regarding compliance requirements
- review, and assist in developing, organisational procedures to meet compliance requirements.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of Australian legal systems and processes, and the context in which they operate, including:
 - basic principles, current statute and common law
 - roles and responsibilities of key organisations
 - constitutional considerations
 - separation of powers
 - basic principles of the law of torts, particularly relating to:
 - negligence
 - negligent misstatement
 - courts and regulatory bodies

- Key features of current legislation and its general impact on business operations in the areas of:
 - consumer law
 - contract law
 - corporations law, including different business organisational structures and regulations for:
 - public and private companies
 - trusts
 - partnerships
 - sole traders
 - property law
 - superannuation law
 - taxation law
- Key decisions in case law and findings
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the accounting field of work and include access to:

- office equipment, technology, software and consumables required to access information on Australian legal systems and processes, including:
 - access to the internet
 - legislative and regulatory documentation required for decision making in own role.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSACC416 Set up and operate a computerised accounting system

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to establish, operate, and modify an integrated computerised accounting system. This is generally under supervision and encompasses processing transactions in the system, maintaining the system, producing reports, and ensuring system integrity.

It applies to individuals who, within the scope of own responsibility, use specialised knowledge, information technology, and planning and organising skills to establish and maintain an organisational system in service and trading environments.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Accounting

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Implement integrated accounting system | <p>1.1 Implement general ledger, chart of accounts, and subsidiary accounts according to organisational requirements, policies and procedures</p> <p>1.2 Set up customers, suppliers and inventory items in system to meet organisational requirements and reporting requirements of goods and services tax (GST)</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|--|
| | 1.3 Identify sources of technical help and use them to solve operational problems |
| 2. Process transactions in system | 2.1 Collate, code, and classify input data before processing 2.2 Process wide range of cash and credit transactions according to organisational policies and procedures 2.3 Use general journal to make balance day adjustments for prepayments and accruals 2.4 Regularly review system output to verify accuracy of data input, and make adjustments for detected processing errors 2.5 Perform end of financial year rollover |
| 3. Maintain system | 3.1 Add new general ledger accounts, and customer, supplier, inventory and fixed asset records as required 3.2 Maintain and update existing chart of accounts, and customer, supplier, inventory and fixed asset records and subsidiary accounts 3.3 Customise chart of accounts to meet reporting requirements of organisation |
| 4. Produce reports | 4.1 Generate reports to indicate financial performance and financial position of organisation and for goods and services tax (GST) purposes 4.2 Generate reports that confirm that subsidiary ledgers and accounts reconcile with general ledger 4.3 Generate reports that confirm that system's bank account entries reconcile with bank statements 4.4 Establish systems and practices to ensure information is stored securely and according to legislative and organisational requirements 4.5 Maintain secure record of processed transactions for audit purposes |

Foundation Skills

This section describes those language, literacy and numeracy and employment skills that are essential to performance.

| Skill | Description |
|----------------------------|--|
| Reading | <ul style="list-style-type: none"> Accesses, manages, and analyses financial information and data from a range of sources and reports |
| Writing | <ul style="list-style-type: none"> Accurately records and checks financial and textual information in documentation and systems Uses correct spelling, grammar and terminology when entering data and preparing reports |
| Oral communication | <ul style="list-style-type: none"> Uses questioning and active listening to clarify and convey information and instructions |
| Numeracy | <ul style="list-style-type: none"> Performs mathematical calculations and uses mathematical problem-solving strategies to analyse financial data and reports |
| Navigate the world of work | <ul style="list-style-type: none"> Identifies and complies with legislative and regulatory requirements, protocols, policies and procedures associated with own role |
| Get the work done | <ul style="list-style-type: none"> Organises work to meet organisational requirements, taking responsibility for process, compliance, and scheduling needs Makes critical and non-critical decisions in relatively complex situations, taking legislative and regulatory requirements into consideration Identifies and responds to predictable problems and implements solutions to issues that have the potential to impact on the data entry and reporting process Implements security requirements for managing digital data |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| FNSACC416 Set up and operate a computerised accounting system (Release 1) | FNSACC406 Set up and operate a computerised accounting system (Release 1) | Elements 4 and 5 integrated into one element. Updates to assessment requirements. | Equivalent unit. |

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSACC416 Set up and operate a computerised accounting system

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- set up the chart of accounts for one organisation by modifying an established integrated financial software system
- implement an integrated computerised accounting system, ensuring integrity of the data
- process transactions in the integrated system, including:
 - BPAY
 - credit card payments
 - direct debit
 - invoices
 - petty cash
- generate reports in the integrated system over at least two reporting periods, including:
 - goods and services tax (GST) accrual report
 - payroll report
 - bank reconciliation report
 - profit and loss statement
 - balance sheet
- maintain computerised accounting system information securely.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Key features of desktop and cloud-based computerised accounting systems
- Key features of organisational policies and procedures relating to setting up and operating a computerised accounting system
- Key requirements of financial services industry legislation relating to information privacy when using computerised accounting systems
- Key features and characteristics of information included in source documents of financial data
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the accounting field of work and include access to:

- office equipment and consumables required to operate a computerised accounting system
- technology and software required to operate a computerised accounting system, including:
 - integrated commercial financial software system and associated data
 - desktop-based and/or cloud-based computerised accounting system
 - access to the internet.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSFLT201 Develop and use a personal budget

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to develop, implement and monitor a personal savings budget. It has wide application and may be used in workplaces, schools, adult and community learning organisations or registered training organisations to build the financial literacy of learners. The unit may also be used as part of pre-vocational or new apprenticeship programs, or as part of services provided by counselling or advisory organisations.

It applies to individuals who use new ideas and techniques to develop personal financial literacy skills.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Financial literacy

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify and discuss budgeting as a financial tool | 1.1 Identify and consider role of budgeting in lives of different groups and importance of budgeting appropriately to meet expenses at different stages of life 1.2 Discuss importance of setting financial goals 1.3 Identify and discuss obstacles that might prevent financial |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | goals being achieved, and types of behaviours and skills required for successful budgeting |
| 2. Prepare to develop a personal budget | <p>2.1 Record all income and expenses for a six-month period to assist in estimating expenditure requirements</p> <p>2.2 Obtain or develop budget spreadsheet to record income and expenditure for relevant period of time</p> <p>2.3 Identify and list all sources of income, regular fixed expenses and variable expenses for specified period in personal budget using budget spreadsheet</p> |
| 3. Develop a personal budget | <p>3.1 Subtract total expenses recorded from total income to determine surplus or deficit budget for specified period</p> <p>3.2 Explore reasons for deficit budget if relevant and investigate ways to reduce expenses or increase income</p> <p>3.3 Explore allocation of surplus funds towards saving and meeting identified financial goals</p> |
| 4. Implement and monitor the personal budget | <p>4.1 Follow budget according to plan for a period of time</p> <p>4.2 Record actual expenses and income for period during which budget is implemented</p> <p>4.3 Compare budgeted expenses and income with actual amounts and modify budget where necessary</p> <p>4.4 Discuss handy hints for managing personal budget</p> <p>4.5 Conduct ongoing review of budget to ensure it remains relevant and to ensure updates are incorporated if necessary</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|----------------------------|--|
| Reading | 1.1-1.3, 2.3, 3.2 | <ul style="list-style-type: none"> Gathers and interprets financial information and identifies key aspects relevant to the task |
| Writing | 1.1-1.3, 2.1-2.3, 4.2, 4.3 | <ul style="list-style-type: none"> Accurately records and documents information relating to personal budgets using correct language, concepts and terminology |

| | | |
|--------------------|---------------------------|---|
| Oral Communication | 1.1-1.3, 4.4 | <ul style="list-style-type: none"> Participates in verbal exchanges using active listening and questioning to develop a clear understanding of budgeting information |
| Numeracy | 2.1, 2.3, 3.1-3.3, 4.1 | <ul style="list-style-type: none"> Performs mathematical calculations including addition, subtraction, multiplication, division and percentages, and interprets financial information relating to budgets |
| Get the work done | 2.1-2.3, 3.1-3.2, 4.1-4.5 | <ul style="list-style-type: none"> Plans routine tasks and organises work according to defined requirements Reviews effectiveness of decisions and makes adjustments as required Uses digital systems and tools to design work processes and complete work tasks |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| FNSFLT201 Develop and use a personal budget | FNSFLT201A Develop and use a personal budget | Updated to meet Standards for Training Packages Minor edits to reflect AQF level | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSFLT201 Develop and use a personal budget

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- prepare a budget spreadsheet
- calculate interest and loan repayments, and surplus or deficit funds
- prepare, implement and monitor a personal budget.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain the purpose, key principles and benefits of budgeting
- explain the importance of setting financial goals
- list obstacles to achieving financial goals
- describe different stages in life and how financial goals may change
- describe the behaviours and skills needed to adhere to a budget
- explain the difference between fixed and variable expenses
- describe the role of credit and savings in managing a budget and establishing personal wealth
- describe the role of financial institutions and their savings products to assist with managing a budget.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the financial literacy field and include access to:

- office equipment, technology, software and consumables

- information about the budgeting process, personal financial records and other relevant resources.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSINC401 Apply principles of professional practice to work in the financial services industry

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to identify industry professional approaches to procedures, guidelines, policies and standards, including ethical requirements, and to model and meet expectations of these in all aspects of work.

It applies to individuals who work in senior roles in the financial services industry and underpins other specialist units used in all sectors of the industry.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the FNS Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Industry capability

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify scope, sectors and responsibilities of industry | 1.1 Identify and consider external forces impacting on financial services industry while carrying out activities 1.2 Identify main sectors of financial services industry and interrelationship between sectors in carrying out activities 1.3 Identify roles and responsibilities of other participants in financial services industry in carrying out activities |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| 2. Identify and apply guidelines, procedures and legislation | <p>2.1 Collect, apply and analyse information on relevant legislation, regulations and codes of practice as applied to financial services industry</p> <p>2.2 Clarify own work practice and regularly refine in light of relevant legislation, regulations and codes of practice, and organisational policy, guidelines and procedures</p> <p>2.3 Apply relevant codes of practice in an ethical approach to workplace practice and decisions</p> |
| 3. Identify sustainability issues | <p>3.1 Obtain and analyse information on sustainability policies, strategies and impacts on industry from a range of sources</p> <p>3.2 Identify and promote environmental sustainability as an integral part of business planning and business opportunity</p> <p>3.3 Incorporate and support triple bottom line principles in work planning</p> |
| 4. Manage information | <p>4.1 Read and discuss with appropriate persons relevant documents and reports that could impact on work effectiveness and compliance</p> <p>4.2 Analyse, evaluate and check documents, reports, data and numerical calculations to meet customer and organisational requirements</p> <p>4.3 Present information in format appropriate for audience</p> |
| 5. Participate in and facilitate work team activities | <p>5.1 Provide feedback to team members to encourage, value and reward individual and team efforts, and contributions</p> <p>5.2 Actively encourage team members to participate in and take responsibility for team activities and communication processes</p> <p>5.3 Support team to identify and resolve problems which impede its performance</p> <p>5.4 Ensure own work serves as role model for others and enhances organisation's image and financial services industry</p> |
| 6. Plan work to be completed | <p>6.1 Determine tasks to be done and identify relevant conditions to work autonomously or in team environment</p> <p>6.2 Plan work to manage resources, time and priorities</p> <p>6.3 Contribute to organisational planning process as required to achieve service improvement</p> <p>6.4 Adapt to changes in technology and work organisation in timely manner</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| 7. Develop and maintain personal competency | <p>7.1 Identify and review personal professional development needs and goals on regular basis</p> <p>7.2 Clarify and comply with competency, authorisation and licensing requirements</p> <p>7.3 Seek professional development opportunities that reflect needs and goals in agreed timeframe</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|----------------------------------|---|
| Learning | 7.1, 7.3 | <ul style="list-style-type: none"> Identifies, plans and implements strategies to manage gaps in personal knowledge |
| Reading | 1.1-1.3, 2.1, 2.2, 3.1, 4.1, 4.2 | <ul style="list-style-type: none"> Analyses and consolidates information and data from a range of sources, against defined criteria and requirements, and checks for accuracy and completeness |
| Writing | 4.3, 5.1, 6.2 | <ul style="list-style-type: none"> Prepares a range of textual information appropriate for audience for informal and formal purposes |
| Oral Communication | 4.1, 4.3, 5.1, 5.2 | <ul style="list-style-type: none"> Participates in verbal exchanges of information using language, tone and pace appropriate to audience and environment Uses listening and questioning techniques to elicit the views and opinions of others and to confirm understanding |
| Numeracy | 3.3, 4.2, 6.2 | <ul style="list-style-type: none"> Performs mathematical calculations to interpret and compare financial data and information Defines timeframes in accordance with schedule requirements |
| Navigate the world of work | 2.1-2.3, 3.1, 4.1, 7.2 | <ul style="list-style-type: none"> Accepts responsibility and ownership for the task and makes decisions on completion parameters and the need for coordination with others Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements |
| Interact with | 2.2, 3.2, 5.1-5.4 | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols |

| | | |
|-------------------|---|--|
| others | | <p>when communicating with clients and co-workers in a range of work contexts</p> <ul style="list-style-type: none"> • Recognises when personal values and beliefs impact on work group and implements basic strategies to moderate the effect • Recognises and accommodates basic differences and priorities of others • Cooperates with others and contributes to work practices where joint outcomes are expected and deadlines are to be met • Recognises behaviours and triggers that contribute to conflict and implements strategies to moderate conflict • Elicits feedback and provides feedback to others to improve self or workgroup behaviours |
| Get the work done | 1.1-1.3, 2.1, 3.1-3.3, 4.1- 4.3, 6.1-6.4, 7.3 | <ul style="list-style-type: none"> • Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes • Makes routine decisions and implements standard procedures for routine tasks, using formal decision-making and problem-solving processes for more complex and non-routine situations • Uses the main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| FNSINC401 Apply principles of professional practice to work in the financial services industry | FNSINC401A Apply principles of professional practice to work in the financial services industry | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSINC401 Apply principles of professional practice to work in the financial services industry

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- access, interpret and analyse product and service information provided by industry sectors in an effective and timely manner
- interpret and comply with relevant financial services legislation, regulations and industry codes of practice, and ethics applicable to the workplace
- recognise and implement sustainability principles and work practices
- accurately analyse, evaluate and organise relevant information
- effectively plan work and maintain a team environment, taking into account any constraints and available resources
- identify and evaluate appropriate professional development opportunities.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- discuss environmental or sustainability legislation, regulations and codes of practice applicable to industry and organisations
- outline the main sectors in the financial services industry and the interrelationships between the sectors
- explain industry and organisational policy and procedures and ethical behaviours in regard to customer service and administration
- outline industry and organisational security practices and rationale
- identify internal administration systems such as accounting systems and databases
- explain principles, practices and available tools and techniques of sustainability management relevant to the industry context

- explain key requirements of relevant legislation, statutory requirements and industry codes of practice as they relate to:
 - consumer credit
 - privacy
 - financial transaction reporting
 - corporations (including accounting standards)
 - financial services
- identify the economic and political climate relating to the financial services industry
- explain triple bottom line principles used in work planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the industry capability field and include access to:

- organisational policy, procedures, legislation, regulations and codes of practice
- specialist financial services software and data
- common office equipment, technology, software and consumables.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSORG601 Negotiate to achieve goals and manage disputes

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to establish and gain agreement to organisational goals, and identify, document and effectively manage disputes with stakeholders to achieve the best outcome.

It applies to individuals who use well-developed judgement skills and a range of negotiation techniques to manage others to reach agreement.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Organisational skills

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish needs of parties | 1.1 Identify desires, needs, requirements and outcomes of all parties using open and professional communication strategies 1.2 Identify and document potential issues and problems, and successful outcomes for organisation and client 1.3 Identify, analyse and discuss strategies and options for achieving outcomes with relevant parties 1.4 Identify and evaluate risks and contingency strategies |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | 1.5 Establish information, facts and issues relevant to situation, and obtain expert advice from third parties or other professionals where required prior to negotiations |
| 2. Negotiate to achieve agreed outcome | <p>2.1 Obtain agreement on strategies and options to achieve goals and complete processes, and communicate it professionally to relevant parties</p> <p>2.2 Review strategies and options for compliance with contractual, legislative, regulatory and professional requirements, in accordance with organisational policy and procedures</p> <p>2.3 Obtain, confirm and correctly document agreement by all parties</p> |
| 3. Identify and document causes of disputes | <p>3.1 Identify and analyse issues or disputes promptly and establish position of relevant parties</p> <p>3.2 Use professional communication techniques that demonstrate respect and empathy for other viewpoints and positions to establish confidence of relevant parties</p> <p>3.3 Document disputes and issues promptly and accurately, and verify with all relevant parties</p> |
| 4. Implement and manage strategies to resolve disputes | <p>4.1 Identify, evaluate and implement strategies and options which are most likely to achieve favourable outcomes for all relevant parties</p> <p>4.2 Implement proceedings promptly to settle dispute in accordance with legislative, regulatory, professional and organisational requirements</p> <p>4.3 Manage dispute to optimise likelihood of favourable outcome for all parties in line with organisational policy and goals</p> <p>4.4 Ensure procedures to resolve dispute are in accordance with organisational policy and procedures, and legislative, regulatory and professional requirements</p> <p>4.5 Document accurate, thorough and accessible records of all aspects of dispute for follow up and future reference</p> <p>4.6 Contact relevant parties to identify any follow up action required to ensure client satisfaction</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|--|--|
| Reading | 1.5, 2.2, 2.3, 3.3, 4.1, 4.2, 4.4 | <ul style="list-style-type: none"> Reviews information from stakeholders and other sources and assesses it to develop strategies that comply with organisational, regulatory and legislative requirements |
| Writing | 1.1-1.5, 2.1, 2.3, 3.1, 3.2, 3.3, 4.5, 4.6 | <ul style="list-style-type: none"> Records discussions of analysis and proposed solutions to a range of issues Documents agreements correctly using a range of text types Produces comprehensive records of evidence and dispute outcomes, including any further actions required |
| Oral Communication | 1.1-1.5, 2.1, 2.3, 3.1, 3.2, 4.6 | <ul style="list-style-type: none"> Uses clear and direct language to present information that is suitable for the audience and context Uses active listening and questioning techniques to encourage discussion, and confirm and clarify understanding |
| Numeracy | 1.4, 1.5, 2.2 | <ul style="list-style-type: none"> Identifies and applies financial risks, systems and regulatory requirements to negotiation processes |
| Navigate the world of work | 1.2-1.5, 2.2, 4.2, 4.3, 4.4 | <ul style="list-style-type: none"> Develops and implements strategies to ensure organisational policies, procedures and regulatory requirements are met |
| Interact with others | 1.1-1.5, 2.1, 2.3, 3.1, 3.2, 3.3, 4.6 | <ul style="list-style-type: none"> Identifies and uses appropriate conventions and protocols when communicating with clients, staff and external stakeholders Implements strategies to build rapport and establish a supportive environment with a diverse range of clients Plays a lead role in situations requiring effective collaborative skills, demonstrating high level negotiation skills and ability to resolve disputes |
| Get the work done | 1.1-1.5, 2.3, 3.3, 4.1, 4.2, 4.5, 4.6 | <ul style="list-style-type: none"> Takes responsibility for planning, sequencing and prioritising complex tasks and own workload to achieve organisational outcomes Addresses complex problems involving multiple variables, using formal analytical and lateral thinking techniques, experience and knowledge to formulate recommendations Uses the main features and functions of digital tools to complete work tasks and access information |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| FNSORG601 Negotiate to achieve goals and manage disputes | FNSORG601A Negotiate to achieve goals and manage disputes | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSORG601 Negotiate to achieve goals and manage disputes

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- apply high level communication, interpersonal and negotiation skills to achieve rapport and empathy with others
- manage relationships to achieve goals and results
- use sound conflict resolution skills and contingency strategies
- comply with relevant legislation, regulations and professional codes of practice.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain dispute resolution and conflict theory and strategies
- describe negotiating processes and strategies
- explain the organisational policy and procedures that relate to negotiation and dispute management
- explain the application of risk assessment and evaluation strategies to dispute management
- explain the application of contract law to dispute management
- outline current legislative, regulatory and industry practices, procedures and services that relate to negotiation and dispute management
- outline relevant business principles and practices
- describe relevant consumer protection requirements.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the organisational skills field of work and include access to:

- common office equipment, technology, software and consumables
- organisational policy and procedures documentation.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSORG602 Develop and manage financial systems

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to strategically manage finances directly linked to organisational performance as defined in a strategic plan. It includes designing systems to accommodate accounting, budgeting, cash flow analysis and financial planning for a small organisation or a business unit of a large organisation.

It applies to individuals in positions of responsibility who use a range of specialist and managerial techniques to assess requirements, and prepare, plan and review their work and that of others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Organisational skills

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish financial system requirements | 1.1 Consult relevant stakeholders and analyse existing financial plans to determine financial system requirements for efficient financial administration 1.2 Identify and record reporting and procedural requirements that affect the organisation for future reference 1.3 Include satisfactory security mechanism for internal financial |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | <p>audit controls in system specifications</p> <p>1.4 Identify risks to financial viability and cost contingency strategies to manage risk</p> |
| 2. Design financial management systems | <p>2.1 Access sources of competent assistance and use advice to secure financial records and assets</p> <p>2.2 Ensure financial management system design provides accurate and timely information about organisation's transactions, working capital and cash flow</p> <p>2.3 Identify, acquire and implement installation of equipment and software needed for operation of system to support organisation's transactions</p> <p>2.4 Ensure financial reporting requirements are known and used by relevant personnel</p> <p>2.5 Ensure established financial reports provide accurate and timely data required for financial decision making</p> <p>2.6 Produce agreed schedules of account recording and reconciliation systems at regular intervals that support organisation's service provision and business decisions</p> <p>2.7 Ensure mechanisms for review of terms of trade and fee structures are suited to organisation's needs and meet industry standards</p> <p>2.8 Prepare financial reports at regular intervals in required format to meet external audit requirements</p> |
| 3. Prepare and review financial plans | <p>3.1 Link financial plans to reviews of organisation's strategic business plan to enable timely financial adjustments</p> <p>3.2 Maintain probity in planning and implementation of financial management activities</p> <p>3.3 Ensure financial plans provide reasonable basis for budgeting and ongoing financial management of organisation</p> |
| 4. Monitor and review financial reporting systems | <p>4.1 Use financial reporting systems to evaluate organisational performance against agreed performance indicators, and enable timely adjustments to be made to business investments</p> <p>4.2 Monitor financial reports and systems to ensure ease of use by staff authorised to manage organisation's finances</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|--|---|
| Reading | 1.1, 1.2, 2.5, 2.7, 4.1, 4.2 | <ul style="list-style-type: none"> Analyses and reviews complex textual and numerical information for relevance, accuracy and compliance with organisational and regulatory requirements |
| Writing | 1.1-1.4, 2.4, 2.8 | <ul style="list-style-type: none"> Uses a range of text types and styles to document stakeholder consultation, identify relevant information from complex texts, determine risk factors and compile reports in required formats |
| Oral Communication | 1.1, 1.2, 2.4, 3.2 | <ul style="list-style-type: none"> Engages in detailed oral exchanges using active listening and questioning techniques to establish facts and information Initiates points of clarification using language appropriate to the purpose and audience Uses clear and direct language to confirm understanding and agreement |
| Numeracy | 1.1-1.4, 2.2, 2.7, 2.8, 3.1, 3.3 | <ul style="list-style-type: none"> Applies highly developed knowledge of accounting, budgets and financial planning to analyse and establish effective systems that meet organisational and regulatory requirements Establishes, evaluates and reviews complex mathematical information |
| Navigate the world of work | 1.2, 1.3, 2.7-2.8, 3.1-3.3, 4.1, 4.2 | <ul style="list-style-type: none"> Takes a lead role in the development and implementation of systems to meet organisational goals and regulatory requirements Seeks to improve policies and procedures to better meet organisational goals |
| Interact with others | 1.1, 2.1, 2.4 | <ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols to gain and provide information relevant to financial management |
| Get the work done | 1.1-1.4, 2.2, 2.3, 2.5-2.8, 3.1-3.3, 4.1 | <ul style="list-style-type: none"> Develops plans to manage relatively complex routine and non-routine tasks with an awareness of how they contribute to broader strategy and goals Sequences, schedules and monitors activities to meet timelines and other organisational requirements Anticipates potential problems and formulates contingency strategies Takes responsibility for high impact decisions in complex situations involving many variables and constraints |

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|--|--|--|
| | | <ul style="list-style-type: none">• Uses digital technologies to manage financial operations and actively investigates new technologies for strategic and operational purposes |
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Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| FNSORG602 Develop and manage financial systems | FNSORG602A Develop and manage financial systems | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSORG602 Develop and manage financial systems

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- determine organisational requirements and design parameters for a financial system
- undertake risk assessment, evaluation and management of financial reporting
- comply with relevant statutory, regulatory, professional and practice requirements
- apply costing and budgeting techniques and tools.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain the key requirements of legislation and regulations relevant to managing financial systems including:
 - finance
 - taxation
 - trust accounts
 - trade practices
 - security requirements
 - ethical requirements
- explain accounting and bookkeeping practices required for financial control
- outline the key features to be considered in financial system design
- explain the key features of organisational administrative systems and practices
- explain cost-benefit analysis
- outline reporting and auditing requirements for business
- explain the types and characteristics of systems, technology and software required to manage the functions of an organisation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the organisational skills field of work and include access to:

- common office equipment, technology, software and consumables
- an integrated financial software system and data.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSPRM601 Establish, supervise and monitor practice systems to conform with legislation and regulations

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to establish, supervise and monitor systems to ensure that a practice or unit of business conforms to legislative and regulatory requirements, and meets standards defined in professional codes of practice.

It applies to individuals who use specialised knowledge, systematic approaches and analytical skills to provide leadership in ensuring compliance and quality standards are met.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the FNS Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Practice management

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify legislation, regulations and codes of practice relevant to the practice | 1.1 Identify relevant legislation, regulations and codes of practice to be complied with in provision of services by the practice or business 1.2 Identify relevant compliance procedures to be established |
| 2. Establish and document procedures for | 2.1 Identify key stakeholders and consult regarding issues and |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| compliance of the practice with relevant legislation, regulations and codes of practice | <p>proposed procedures and guidelines</p> <p>2.2 Incorporate compliance issues and procedures into practice guidelines and document appropriately</p> <p>2.3 Identify and document sources of information and advice on legislative and regulatory requirements</p> <p>2.4 Establish and document procedures for ensuring currency of information within practice</p> <p>2.5 Establish and incorporate into practice guidelines, ethical procedures and standards for interpretation of legislation, regulations and codes of practice</p> <p>2.6 Establish procedures for monitoring compliance with legislation, regulations and codes of practice within practice and for outsourced third party providers</p> |
| 3. Establish risk management procedures for compliance with legislation and regulations | <p>3.1 Establish and document structured and systematic risk management process, which takes into account practice obligations under relevant legislation and regulations</p> <p>3.2 Identify and document risks of non-compliance</p> <p>3.3 Establish, document and communicate to staff measures to avoid non-compliance and steps to be taken in event of breaches of obligations</p> <p>3.4 Ensure measures are consistent with Australian state and federal regulations for licensees and authorised representatives</p> |
| 4. Identify and establish appropriate resources for ensuring the practice can meet its legislative and regulatory requirements | <p>4.1 Identify appropriate levels of financial, technological and human resources to meet practice's legislative and regulatory requirements</p> <p>4.2 Implement training and assessment procedures to ensure employees have skills needed to comply with legislative and regulatory requirements</p> <p>4.3 Establish clear decision-making procedures on legislative and regulatory issues, including identification to employees of licensees, authorised representatives, directors and other staff carrying legislative and regulatory responsibilities</p> <p>4.4 Establish and maintain information technology systems and other technological resources to level necessary to enable compliance with legislative and regulatory requirements</p> <p>4.5 Ensure budgets, requisition procedures and other internal financial systems clearly identify support for legislative and regulatory functions</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---------------------------------------|---|
| Reading | 1.1, 1.2, 2.1, 2.3, 3.4, 4.1 | <ul style="list-style-type: none"> Researches and analyses key features of detailed and complex textual information from a range of sources to identify specific criteria and determine actions required |
| Writing | 2.1-2.6, 3.1, 3.2, 3.3, 4.3 | <ul style="list-style-type: none"> Prepares a range of documents incorporating clear and detailed instructions organised sequentially for internal reference Uses clear and concise language, correct spelling and grammar and appropriate terminology to convey information appropriate to the audience and purpose of the documentation |
| Oral Communication | 2.1, 3.3 | <ul style="list-style-type: none"> Participates in verbal exchanges, using active listening and questioning techniques to elicit information from others and to confirm understanding Provides instructions and presents information structuring tone, pace and content in line with audience and purpose |
| Numeracy | 4.1, 4.5 | <ul style="list-style-type: none"> Interprets, compares and consolidates numerical and financial information to determine requirements |
| Navigate the world of work | 1.1, 1.2, 2.3-2.6, 3.1, 3.4, 4.1-4.5 | <ul style="list-style-type: none"> Takes a lead role in the development of organisational goals, roles and responsibilities Develops and implements strategies that ensure organisational policy, procedures and regulatory requirements are being met Monitors and reviews organisational policy, procedures and adherence to legislative requirements to implement and manage change |
| Interact with others | 2.1, 3.3, 4.2 | <ul style="list-style-type: none"> Uses a variety of relevant communication tools and strategies in building and maintaining effective working relationships Influences and fosters a collaborative culture, facilitating a sense of commitment and workplace cohesion |
| Get the work done | 1.1, 1.2, 2.1, 2.2, 2.4-2.6, 3.1-3.3, | <ul style="list-style-type: none"> Uses digital technologies to manage business operations and actively investigates new technologies |

| | | |
|--|---------|---|
| | 4.1-4.5 | <p>for strategic and operational purposes</p> <ul style="list-style-type: none">• Plans strategic priorities and outcomes within a flexible, efficient and effective context in a diverse environment exposed to competing demands• Gathers and analyses data and seeks feedback to improve plans and processes• Explores and incubates new and innovative ideas through unconstrained analysis and critical thinking to develop and improve the organisation's goals |
|--|---------|---|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|--|--------------------|
| FNSPRM601 Establish, supervise and monitor practice systems to conform with legislation and regulations | FNSPRM601A Establish, supervise and monitor practice systems to conform with legislation and regulations | Updated to meet Standards for Training Packages. Minor rewording to clarify intent of performance criteria. | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSPRM601 Establish, supervise and monitor practice systems to conform with legislation and regulations

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- develop strategies to obtain a wide range of relevant information and assess its accuracy and relevance
- assess risks and benefits associated with using legislation and regulation databases and systems against practice requirements to make recommendations
- develop and document compliance and risk management procedures
- apply cost–benefit analyses to ensure optimal development of systems and procedures
- comply with risk management standards
- develop procedures and processes for monitoring ethical operations of the practice and of outsourced third party providers.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe the key requirements of relevant legislation, regulations and codes of practice using knowledge of a wide range of available information sources, including legal resources
- describe a range of documentation systems, including registry and library processes
- describe the key features of:
 - financial practice administrative processes and systems
 - human resources procedures and training options
 - office information technology systems and software
- describe the key processes and products of financial professional services

- outline the professional development options for financial personnel
- explain the key requirements of relevant legislation, regulations and codes of practice
- compare and contrast risk management techniques and tools.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the practice management field of work and include access to:

- office equipment, technology, software and consumables
- relevant legislation, regulations and codes of practice.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FNSTPB402 Establish and maintain payroll systems

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Application

This unit describes the skills and knowledge required to record and prepare payroll documentation, respond to enquiries, and process payroll data for manual and computerised systems.

It applies to individuals, including BAS agents, who use a range of organisational and other specialist techniques. They may work directly for organisations or be small business owners, contractors or service providers.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. This unit is designed to meet the education requirements of the Tax Practitioner Board (TPB). Refer to the FNS Financial Services Training Package Companion Volume Implementation Guide or the relevant regulator for specific guidance on regulatory requirements.

Unit Sector

Bookkeeping

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish payroll requirements | 1.1 Assess scope of payroll services that a business activity statement (BAS) agent can provide, and identify need for independent expert advice 1.2 Apply knowledge of legislation in relation to National Employment Standards, and legislative requirements in regard to |

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|--|
| | <p>payroll payments</p> <p>1.3 Research and identify relevant state and modern awards, and employment agreements, regarding details to be set up in payroll system for individual employees</p> |
| 2. Record payroll data | <p>2.1 Configure payroll system with complete data provided by employee and employer</p> <p>2.2 Review payroll data and clarify discrepancies with designated persons</p> <p>2.3 Enter employee pay period details in payroll system in line with source data</p> |
| 3. Prepare and process payroll | <p>3.1 Conduct payroll preparation within designated timeframes and according to organisational policy and procedures</p> <p>3.2 Use employee source data to calculate, record and reconcile payroll according to legislative requirements</p> <p>3.3 Reconcile total payments for pay period, and review and correct irregularities or refer them to designated persons for resolution</p> <p>3.4 Obtain authorisation of payroll and make arrangements for individuals' payments in line with organisational requirements</p> <p>3.5 Distribute individual pay advice according to organisational and legislative requirements</p> <p>3.6 Identify legislative and organisational requirements relevant to employment termination processes and payment, and seek advice to interpret requirements as required</p> <p>3.7 Produce, review and store payroll records according to organisational policy and security procedures</p> |
| 4. Handle payroll enquiries | <p>4.1 Respond to payroll enquiries according to organisational and legislative requirements</p> <p>4.2 Provide information according to organisational and legislative requirements</p> <p>4.3 Refer enquiries outside area of responsibility or knowledge to designated persons for resolution</p> <p>4.4 Provide additional information or complete follow-up action within designated timeframes and according to organisational policy and procedures</p> |
| 5. Maintain payroll | <p>5.1 Maintain information and record keeping relating to payroll function according to current legislative and regulatory</p> |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| | <p>requirements</p> <p>5.2 Prepare and reconcile month-end and year-end payroll records to ensure compliance with legislative and management deadlines</p> <p>5.3 Update records and systems in line with salary reviews and other changes in employment status</p> <p>5.4 Establish back-up and disaster recovery systems</p> <p>5.5 Generate and distribute payroll reports in line with organisational policy</p> <p>5.6 Extract and apply BAS and instalment activity statement (IAS) data according to legislative and regulatory requirements</p> |

Foundation Skills

This section describes those language, literacy and numeracy and employment skills that are essential to performance.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Reviews and compares details of information to meet requirements, and interprets and analyses an extensive range of structurally intricate texts to inform actions |
| Writing | <ul style="list-style-type: none"> Records detailed information accurately in required formats for individuals Prepares, produces and updates accurate payroll record information in a range of report formats to meet organisational requirements Produces logically sequenced texts in response to enquiries |
| Oral communication | <ul style="list-style-type: none"> Participates effectively in exchanges of information using questioning and active listening to clarify details, and clear and direct language to refer problems to supervisor Clearly articulates responses to enquiries using language, tone and pace appropriate to audience |
| Numeracy | <ul style="list-style-type: none"> Uses calculation skills and mathematical formulas to prepare, record, reconcile, check and report payroll data in a range of formats Defines timeframes in line with schedule requirements |
| Navigate the world of work | <ul style="list-style-type: none"> Takes responsibility for complying with organisational policy and procedures, and legal and regulatory requirements |

| Skill | Description |
|----------------------|--|
| Interact with others | <ul style="list-style-type: none"> Cooperates and collaborates with others as part of familiar routine activities and contributes to activities requiring joint responsibility and accountability |
| Get the work done | <ul style="list-style-type: none"> Plans, organises and completes work according to defined requirements, taking responsibility for sequencing tasks to achieve efficient outcomes Uses systematic analytical processes in complex routine and non-routine situations, gathering information, reviewing and reconciling data, and identifying and evaluating potential solutions Uses digital tools to conduct research, design work processes and to complete work tasks |

Range of Conditions

This section specifies different work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included.

| | |
|---|---|
| Payroll preparation must include: | <ul style="list-style-type: none"> calculating gross pay calculating net pay preparing pay advice slips preparing payments calculating superannuation, taxation and other deductions. |
| Payroll records must include: | <ul style="list-style-type: none"> electronic funds transfer employee summary report end of month reports end of year reports pay advice slips payment summaries taxation reports termination payments. |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|----------|--------------------|
| | | | |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| FNSTPB402 Establish and maintain payroll systems (Release 1) | FNSBKG405 Establish and maintain a payroll system (Release 2) | Updated to meet Tax Practitioners Board requirements. Minor editorial changes to unit title. Changes to performance criteria in Elements 1–3. Changes to assessment requirements to clarify intent. | Equivalent unit. |

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSTPB402 Establish and maintain payroll systems

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with FNS Financial Services Training Package Version 3.0. |

Performance Evidence

Evidence of the ability to:

- identify, calculate and input data from time-recording systems for payments into manual or computerised payroll systems
- produce a payroll report according to organisational and legislative requirements
- present a payroll report for verification and approval
- maintain records according to organisational and legislative requirements that relate to security and confidentiality of information.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.

- Scope of services offered by a business activity statement (BAS) agent providing payroll services
- Key principles of award and enterprise agreements and industrial instruments required to maintain payroll systems
- Organisational policy and procedures that affect payroll, including the structure of authority in organisations
- Industry codes of practice relevant to payroll operations
- Key features of manual and computerised payroll systems
- Legislative and record-keeping requirements from all levels of government that affect business operation and reporting requirements, especially in regard to:

- Fair Work Act
- National Employment Standards
- Superannuation Guarantee (Administration) Act
- corporations law
- workers compensation and work health and safety
- state payroll tax relating to payroll activities
- Privacy Act and requirements relating to confidentiality and security of records
- Higher Education Loan Program (HELP)
- Medicare levy
- Tax Agent Services Act (TASA)
- current commonwealth, state and territory industry and modern awards, and enterprise bargaining agreements
- individual employment agreements
- commonwealth, state and territory leave Acts, including annual, personal, paid parental and long service
- Australian Bureau of Statistics (ABS) Act
- Current Australian Taxation Office (ATO) requirements relating to payroll systems, including:
 - Australian business number (ABN)
 - payment summaries
 - employment termination payments (ETPs)
 - tax file number (TFN) declaration
- Tax Practitioners Board (TPB) requirements relating to payroll systems, including:
 - registration and scope of services documentation requirements for BAS agents
 - code of professional conduct
- Key requirements of taxation law relating to payroll systems, including:
 - pay as you go instalment (PAYGI) tax
 - pay as you go withholding (PAYGW) tax
 - fringe benefits tax (FBT) as it relates to salary packaging
- Key aspects of routine and non-routine requirements for payroll, including:
 - routine: award payments, salary amount, salary packaging, superannuation guarantee and superannuation reporting
 - non-routine: termination payments and superannuation guarantee charge
-

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the bookkeeping field of work and include access to:

- office equipment, technology, software and consumables required to establish and maintain a payroll system, including:
 - workplace reference materials, such as procedural manuals and organisational policy
 - actual or simulated payroll data.

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

This unit is designed to meet the education requirements of the Tax Practitioner Board (TPB). Where registration with the TPB is sought, assessment must reflect the conditions described by the regulator which stipulate that a significant amount (at least 40%) must be completed under some form of independent supervision. Where recognition of prior learning (RPL) is used, it must also meet the requirements of the Board's policy on RPL.

Details of requirements can be accessed on the TPB website at <http://www.tpb.gov.au>.

If undertaking this unit for BAS agent registration, the following items in the Range of Conditions must be addressed in the assessment to meet educational requirements for registration with the TPB:

- payroll preparation
- payroll records.
-

Links

Companion volumes are available from VETNet. -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

FSKDIG002 Use digital technology for routine and simple workplace tasks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with FSK Foundation Skills Training Package Version 2.0. |

Application

This unit describes the skills and knowledge required to use digital technology to undertake workplace tasks that are simple and routine in nature. It requires the ability to identify and interpret technical instructions, and setup and apply a range of digital technologies to achieve predetermined outcomes.

An individual performing these tasks may work with an expert or mentor where support is available if requested.

This unit applies to individuals who use, or are preparing to use, digital skills to complete workplace activities. This includes existing workers and individuals preparing for employment through vocational education and training. This unit should be integrated and contextualised with vocational training to support achievement of vocational competency.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Digital Technology

Elements and Performance Criteria

| Element | Performance Criteria |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to use digital technology for routine and simple task | 1.1 Identify nature and scope of routine and simple workplace task that requires the use of digital technology 1.2 Identify purpose of task and required outcome 1.3 Identify, select and locate appropriate digital technology required |

| Element | Performance Criteria |
|---|---|
| | for task 1.4 Locate and identify simple workplace information and terminology associated with technology |
| 2. Perform routine and simple workplace task using digital technology | 2.1 Interpret and follow simple instructions to access and use digital technology required for the task 2.2 Use technology to enter, store and retrieve information relevant to the task 2.3 Comply with workplace procedures relevant to using digital technology in completing task 2.4 Use basic security protocols related to workplace task |
| 3. Finalise task | 3.1 Complete use of technology for designated task in accordance with workplace procedures 3.2 Review performance against required outcome 3.3 Seek feedback on performance against outcomes and identify ways to improve performance |

Foundation Skills

This section describes language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Mapping Information

Supersedes and is equivalent to FSKDIG02 Use digital technology for simple workplace tasks.

Links

Companion Volume Implementation Guide is found on VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=f572fe10-a855-4986-9295-3852c771f178>

Assessment Requirements for FSKDIG002 Use digital technology for routine and simple workplace tasks

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with FSK Foundation Skills Training Package Version 2.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- use digital technology to complete at least three routine and simple workplace tasks with different required outcomes and in accordance with workplace procedures.

During the above, the candidate must use the main features and functions of the selected digital technology and suitable security protocols.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit, including knowledge of:

- outcomes of routine and simple workplace tasks
- familiar types of digital technology commonly used in the workplace, their purposes and their uses
- familiar workplace instructions and procedures for the use of digital technology relevant to routine and simple workplace tasks
- relevant ethical and security practices applicable to workplace digital technology
- simple conventions of online etiquette
- strategies to review and improve performance.

Assessment Conditions

Competency is to be assessed in the workplace, a workplace simulated environment or a vocational training context.

Skills must be demonstrated using routine and simple tasks that reflect those typically found in a workplace.

The following resources are to be made available:

- an expert or mentor to provide support to learner if requested
- digital technology required to complete the performance evidence
- workplace procedures required to complete the performance evidence
- own familiar support resources.

Assessors must:

- satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards, and
- have sound knowledge of the ACSF, and
- have demonstrable expertise, knowledge and skills in the vocational contextualisation and assessment of digital technology, and
- have completed the following or equivalent:
 - TAESS00009 Address Foundation Skills in Vocational Practice Skill Set; or
 - a higher level education qualification, such as:
 - TAE80113 Graduate Diploma of Adult Language, Literacy and Numeracy Practice (and its equivalent TAE70111); or
 - Bachelor of Education, Graduate Certificate or Graduate Diploma of Education, or higher. This may include qualifications relating to TESOL, adult education or vocational education.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=f572fe10-a855-4986-9295-3852c771f178>

FSKLRG011 Use routine strategies for work-related learning

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with FSK Foundation Skills Training Package Version 2.0. |

Application

This unit describes the skills and knowledge required to identify own learning goals and needs and develop a formal learning plan to participate in a vocational or workplace learning environment.

An individual performing these tasks works independently and uses familiar support resources as needed.

This unit applies to individuals who use, or are preparing to use, learning skills to complete workplace activities. This includes existing workers and individuals preparing for employment through vocational education and training. This unit should be integrated and contextualised with vocational training to support achievement of vocational competency.

This unit is aligned to, but does not fully address, the Australian Core Skills Framework (ACSF) learning core skill indicators .01 and .02 at level 3 in the workplace and employment domain of communication.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Learning

Elements and Performance Criteria

| Element | Performance Criteria |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for learning | 1.1 Identify work-related learning goals 1.2 Investigate and select a range of formal and informal learning |

| Element | Performance Criteria |
|---------------------------------|--|
| | pathways 1.3 Investigate a range of approaches to achieve goals, identifying strengths and limitations of approaches 1.4 Anticipate potential barriers to learning |
| 2. Use strategies for learning | 2.1 Identify and select work-related goal 2.2 Identify a preferred approach to achieving work-related learning goal 2.3 Identify and implement strategies to address barriers to achieving learning goal 2.4 Propose routine learning strategies to achieve learning goal 2.5 Identify and access a range of reliable support resources 2.6 Create and use a formal learning plan to implement strategies |
| 3. Review own learning progress | 3.1 Monitor progress against plan and reflect on actions and outcomes, identifying options for improvement 3.2 Seek feedback on learning progression 3.3 Identify areas for further learning and training |

Foundation Skills

This section describes language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Mapping Information

Supersedes and is equivalent to FSKLRG11 Use routine strategies for work-related learning.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=f572fe10-a855-4986-9295-3852c771f178>

Assessment Requirements for FSKLRG011 Use routine strategies for work-related learning

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with FSK Foundation Skills Training Package Version 2.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop at least one formal learning plan to support the achievement of identified work-related learning goal and learning pathway
- check and review progress against plan on at least one occasion.
-

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- work related tasks requiring learning
- common barriers to learning and solutions to address barriers
- routine strategies to support learning goals
- own learning goals
- relevant education and training requirements for selected learning pathway options
- relevant support resources for personal learning goals and techniques to assess validity of source
- typical features of a formal learning plan
- approaches to check and respond to progress of learning plans.
-

Assessment Conditions

Competency is to be assessed in the workplace, a workplace simulated environment or a vocational training context.

Skills must be demonstrated using routine texts or tasks that reflect those typically found in a workplace.

The following resources are to be made available:

- own familiar support resources.

Assessors must:

- satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards, and
- have sound knowledge of the ACSF and performance features of the ACSF level being assessed, and
- have demonstrable expertise, knowledge and skills in the vocational contextualisation and assessment of the core skill, learning, and
- have completed the following or equivalent:
 - TAESS00009 Address Foundation Skills in Vocational Practice Skill Set; or
 - a higher level education qualification, such as:
 - TAE80113 Graduate Diploma of Adult Language, Literacy and Numeracy Practice (and its equivalent TAE70111); or
 - Bachelor of Education, Graduate Certificate or Graduate Diploma of Education, or higher. This may include qualifications relating to TESOL, adult education or vocational education.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=f572fe10-a855-4986-9295-3852c771f178>

FSKOCM006 Use oral communication skills to participate in workplace teams

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with FSK Foundation Skills Training Package Version 2.0. |

Application

This unit describes the skills and knowledge required to participate in and contribute to workplace teams, such as providing services and information, communicating workplace instructions and messages, or participating in team meetings.

An individual performing these tasks works independently and uses familiar support resources as needed.

This unit applies to individuals who use, or are preparing to use, oral communication skills to complete workplace activities. This includes existing workers and individuals preparing for employment through vocational education and training. This unit should be integrated and contextualised with vocational training to support achievement of vocational competency.

This unit is aligned to, but does not fully address, the Australian Core Skills Framework (ACSF) oral communication core skill indicators .07 and .08 at level 3 in the workplace and employment domain of communication.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Oral Communication

Elements and Performance Criteria

| Element | Performance Criteria |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Plan to interact in workplace team | 1.1 Identify purpose of interaction |

| Element | Performance Criteria |
|---|--|
| | 1.2 Identify workplace audience and establish appropriate register 1.3 Identify information relevant to exchange 1.4 Identify oral communication strategies to communicate effectively in a team |
| 2. Interact effectively in workplace team | 2.1 Use oral communication strategies for routine interaction 2.2 Interact using conventional grammar, every day and some specific vocabulary, and routine pronunciation appropriate to workplace 2.3 Recognise and use appropriate non-verbal communication and interactional strategies to support interaction with workplace team |
| 3. Review interaction | 3.1 Seek feedback and evaluate effectiveness of participation 3.2 Review success of interaction to meet workplace outcomes 3.3 Identify areas for improvement |

Foundation Skills

This section describes language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

Supersedes and is equivalent to FSKOCM06 Use oral communication skills to participate in workplace teams.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=f572fe10-a855-4986-9295-3852c771f178>

Assessment Requirements for FSKOCM006 Use oral communication skills to participate in workplace teams

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with FSK Foundation Skills Training Package Version 2.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- participate in and review the success of at least two different spoken exchanges in a workplace team.

Participation must include speaking and listening.

Knowledge Evidence

During the above spoken exchange the candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- common purposes and audiences of routine workplace team interactions
- appropriate register for formal and informal workplace team interactions
- relevant oral communication strategies that support participation in workplace teams
- intelligible pronunciation of key language
- routine and some specialised vocabulary non-verbal feedback strategies and how to use them in workplace team interactions
- strategies to review success in meeting identified purpose of presentation and to identify areas of improvement.
-

Assessment Conditions

Competency is to be assessed in the workplace, a workplace simulated environment or a vocational training context. Spoken exchanges must be undertaken with real individuals in a team.

Skills must be demonstrated using routine oral exchanges that reflect those typically undertaken in a workplace.

The following resources are to be made available:

- own familiar support resources
- participants for spoken exchanges described in performance evidence.

Assessors must:

- satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards, and
- have sound knowledge of the ACSF and performance features of the ACSF level being assessed, and
- have demonstrable expertise, knowledge and skills in the vocational contextualisation and assessment of the core skill, oral communication, and
- have completed the following or equivalent:
 - TAESS00009 Address Foundation Skills in Vocational Practice Skill Set; or
 - a higher level education qualification, such as:
 - TAE80113 Graduate Diploma of Adult Language, Literacy and Numeracy Practice (and its equivalent TAE70111); or
 - Bachelor of Education, Graduate Certificate or Graduate Diploma of Education, or higher. This may include qualifications relating to TESOL, adult education or vocational education.
 -

Links

Companion Volume Implementation Guide is found on VETNet -

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HLTAID003 Provide first aid

Modification History

| Release | Comments |
|-----------|--|
| Release 6 | Updated: <ul style="list-style-type: none">• assessor requirements statement• foundation skills lead in statement• licensing statement• modification history to reflect 2012 standards Equivalent outcome. |
| Release 5 | Updated mapping information. Changes to assessment requirements. Equivalent outcome. |
| Release 4 | Updated mapping information. Equivalent outcome. |
| Release 3 | Updated mapping information. |
| Release 2 | Minor corrections to formatting to improve readability. Equivalent competency outcome. |
| Release 1 | <p>This version was released in <i>HLT Health Training Package release 1.0</i> and meets the requirements of the 2012 Standards for Training Packages.</p> <p>Significant changes to elements and performance criteria, changes to scope of unit. New evidence requirements for assessment.</p> <p>Removal of prerequisite unit.</p> |

Application

This unit describes the skills and knowledge required to provide a first aid response to a casualty. The unit applies to all workers who may be required to provide a first aid response in a range of situations, including community and workplace settings.

Specific licensing /regulatory requirements relating to this competency, including requirements for refresher training should be obtained from the relevant national/state/territory Work Health and Safety Regulatory Authorities.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

Elements define the essential outcomes.

Performance criteria specify the level of performance needed to demonstrate achievement of the element.

1. Respond to an emergency situation

- 1.1 Recognise an emergency situation
- 1.2 Identify, assess and manage immediate hazards to health and safety of self and others
- 1.3 Assess the casualty and recognise the need for first aid response
- 1.4 Assess the situation and seek assistance from emergency response services

2. Apply appropriate first aid procedures

- 2.1 Perform cardiopulmonary resuscitation (CPR) in accordance with Australian Resuscitation Council (ARC) guidelines
- 2.2 Provide first aid in accordance with established first aid principles
- 2.3 Display respectful behaviour towards casualty
- 2.4 Obtain consent from casualty where possible
- 2.5 Use available resources and equipment to make the casualty as comfortable as possible
- 2.6 Operate first aid equipment according to manufacturer's instructions
- 2.7 Monitor the casualty's condition and respond in accordance with first aid principles

3. Communicate details of the incident

- 3.1 Accurately convey incident details to emergency response services
- 3.2 Report details of incident to workplace supervisor as appropriate
- 3.3 Maintain confidentiality of records and information in line with statutory and/or organisational policies

ELEMENT**PERFORMANCE CRITERIA**

Elements define the essential outcomes.

Performance criteria specify the level of performance needed to demonstrate achievement of the element.

4. Evaluate the incident and own performance

4.1 Recognise the possible psychological impacts on self and other rescuers involved in critical incidents

4.2 Participate in debriefing to address individual needs

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ced1390f-48d9-4ab0-bd50-b015e5485705>

Assessment Requirements for HLTAID003 Provide first aid

Modification History

| Release | Comments |
|-----------|--|
| Release 6 | Updated: <ul style="list-style-type: none">• assessor requirements statement• foundation skills lead in statement• licensing statement• modification history to reflect 2012 standards Equivalent outcome. |
| Release 5 | Updated mapping information. Changes to assessment requirements. Equivalent outcome. |
| Release 4 | Updated mapping information. Equivalent outcome. |
| Release 3 | Updated mapping information. |
| Release 2 | Minor corrections to formatting to improve readability. Equivalent competency outcome. |
| Release 1 | <p>This version was released in <i>HLT Health Training Package release 1.0</i> and meets the requirements of the 2012 Standards for Training Packages.</p> <p>Significant changes to elements and performance criteria, changes to scope of unit. New evidence requirements for assessment.</p> <p>Removal of prerequisite unit.</p> |

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the job role.

There must be evidence that the candidate has completed the following tasks in line with state/territory regulations, first aid codes of practice, Australian Resuscitation Council (ARC) guidelines and workplace procedures:

- Followed DRSABCD in line with ARC guidelines, including:

- performed at least 2 minutes of uninterrupted single rescuer cardiopulmonary resuscitation (CPR) (5 cycles of both compressions and ventilations) on an adult resuscitation manikin placed on the floor
- performed at least 2 minutes of uninterrupted single rescuer CPR (5 cycles both compressions and ventilations) on an infant resuscitation manikin placed on a firm surface
- responded appropriately in the event of regurgitation or vomiting
- managed the unconscious breathing casualty
- followed single rescue procedure, including the demonstration of a rotation of operators with minimal interruptions to compressions
- followed the prompts of an Automated External Defibrillator (AED)
- Responded to at least two simulated first aid scenarios contextualised to the candidate's workplace/community setting, including:
 - conducted a visual and verbal assessment of the casualty
 - demonstrated safe manual handling techniques
 - post-incident debrief and evaluation
 - provided an accurate verbal or written report of the incident
- Applied first aid procedures for the following:
 - allergic reaction
 - anaphylaxis
 - bleeding control
 - choking and airway obstruction
 - envenomation, using pressure immobilisation
 - fractures, sprains and strains, using arm slings, roller bandages or other appropriate immobilisation techniques
 - respiratory distress, including asthma
 - shock

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge required to effectively complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the work role. This includes knowledge of:

- State/Territory regulations, first aid codes of practice and workplace procedures including:
 - ARC Guidelines relevant to provision of CPR and first aid
 - safe work practices to minimise risks and potential hazards
 - infection control principles and procedures, including use of standard precautions
 - requirements for currency of skill and knowledge
- legal, workplace and community considerations including:
 - awareness of potential need for stress-management techniques and available support following an emergency situation
 - duty of care requirements

- respectful behaviour towards a casualty
- own skills and limitations
- consent
- privacy and confidentiality requirements
- importance of debriefing
- considerations when providing first aid including:
 - airway obstruction due to body position
 - appropriate duration and cessation of CPR
 - appropriate use of an AED
 - chain of survival
 - standard precautions
 - how to conduct a visual and verbal assessment of the casualty
- principles and procedures for first aid management of the following scenarios:
 - abdominal injuries
 - allergic reaction
 - anaphylaxis
 - basic care of a wound
 - bleeding control
 - burns
 - cardiac conditions, including chest pain
 - choking and airway obstruction
 - crush injuries
 - diabetes
 - dislocations
 - drowning
 - envenomation
 - environmental impact, including hypothermia, hyperthermia, dehydration and heat stroke
 - eye and ear injuries
 - fractures
 - febrile convulsions
 - head, neck and spinal injuries
 - minor skin injuries
 - needle stick injuries
 - poisoning and toxic substances
 - respiratory distress, including asthma
 - seizures, including epilepsy
 - shock
 - soft tissue injuries, including strains and, sprains
 - stroke

- unconsciousness
- basic anatomy and physiology relating to:
 - how to recognise a person is not breathing normally
 - chest
 - response/consciousness
 - upper airway and effect of positional change
 - considerations in provision of first aid for specified conditions

Assessment Conditions

Skills must be demonstrated working individually in an environment that provides realistic in-depth, industry-validated scenarios and simulations to assess candidates' skills and knowledge.

Assessment resources must include:

- adult and infant resuscitation manikins in line with ARC Guidelines for the purpose of assessment of CPR procedures
- adrenaline auto-injector training device
- AED training device
- placebo bronchodilator and spacer device
- roller bandages
- triangular bandages
- workplace First Aid kit
- workplace injury, trauma and/or illness record, or other appropriate workplace incident report form for written reports
- wound dressings

Simulated assessment environments must simulate the real-life working environment where these skills and knowledge would be performed, with all the relevant equipment and resources of that working environment.

Assessor requirements

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ced1390f-48d9-4ab0-bd50-b015e5485705>

HLTAID005 Provide first aid in remote situations

Modification History

| Release | Comments |
|-----------|---|
| Release 5 | Updated: <ul style="list-style-type: none">• assessor requirements statement• foundation skills lead in statement• licensing statement• modification history to reflect 2012 standards Equivalent outcome. |
| Release 4 | Updated mapping information. Changes to assessment requirements. Equivalent outcome. |
| Release 3 | Updated mapping information. Equivalent outcome. |
| Release 2 | Minor changes to formatting to improve readability. |
| Release 1 | <p>This version was released in <i>HLT Health Training Package release 1.0</i> and meets the requirements of the New Standards for Training Packages.</p> <p>Significant changes to elements and performance criteria, changes to scope of unit.</p> <p>New evidence requirements for assessment, including use of contextualised remote scenarios.</p> |

Application

This unit describes the skills and knowledge required to provide first aid response and emergency life support to a casualty in a remote and/or isolated situation.

The unit applies to workers who may be required to prepare for and provide a first aid response in locations beyond the reach of timely medical assistance.

Specific licensing /regulatory requirements relating to this competency, including requirements for refresher training should be obtained from the relevant national/state/territory Work Health and Safety Regulatory Authorities.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

Elements define the essential outcomes.

Performance criteria specify the level of performance needed to demonstrate achievement of the element.

1. Respond to a remote emergency situation

- 1.1 Plan for isolated travel or work if required, accounting for expected contingencies
- 1.2 Recognise an emergency situation
- 1.3 Identify, assess and manage immediate hazards to health and safety of self and others
- 1.4 Assess the casualty and recognise the need for first aid response
- 1.5 Assess the situation and evaluate options for medical assistance
- 1.6 Evaluate options for transporting casualty or waiting for medical assistance in relation to environmental issues, risks, transport availability and casualty condition

2. Apply appropriate first aid procedures

- 2.1 Perform cardiopulmonary resuscitation (CPR) in accordance with Australian Resuscitation Council (ARC) guidelines
- 2.2 Provide first aid in accordance with established first aid principles
- 2.3 Display respectful behaviour towards casualty
- 2.4 Obtain consent from casualty where possible
- 2.5 Use available resources and equipment to make the casualty as comfortable as possible
- 2.6 Operate first aid equipment according to manufacturer's instructions
- 2.7 Monitor the casualty's condition and respond in accordance with first aid principles

3. Manage the incident

- 3.1 Seek assistance from others present to manage incident circumstances
- 3.2 Establish communication links with emergency response services and convey incident details
- 3.3 Report details of casualty condition, changes in

ELEMENT**PERFORMANCE CRITERIA**

Elements define the essential outcomes.

Performance criteria specify the level of performance needed to demonstrate achievement of the element.

condition, management and responses

3.4 Assist in the evacuation of the casualty by following directions given by emergency response services as required

3.5 Maintain confidentiality of records and information in line with statutory and/or organisational policies

4. Evaluate the incident and own performance

4.1 Recognise the possible psychological impacts on self and other rescuers involved in critical incidents

4.2 Participate in debriefing to address individual needs

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ced1390f-48d9-4ab0-bd50-b015e5485705>

Assessment Requirements for HLTAID005 Provide first aid in remote situations

Modification History

| Release | Comments |
|-----------|--|
| Release 5 | Updated: <ul style="list-style-type: none"> • assessor requirements statement • foundation skills lead in statement • licensing statement • modification history to reflect 2012 standards Equivalent outcome. |
| Release 4 | Updated mapping information. Changes to assessment requirements. Equivalent outcome. |
| Release 3 | Updated mapping information. Equivalent outcome. |
| Release 2 | Minor changes to formatting to improve readability. |
| Release 1 | This version was released in <i>HLT Health Training Package release 1.0</i> and meets the requirements of the New Standards for Training Packages. Significant changes to elements and performance criteria, changes to scope of unit. New evidence requirements for assessment, including use of contextualised remote scenarios. |

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the job role.

There must be evidence that the candidate has completed the following tasks in line with state/territory regulations, first aid codes of practice, Australian Resuscitation Council (ARC) guidelines and workplace procedures:

- Followed DRSABCD in line with ARC guidelines, including:
 - performed at least 2 minutes of uninterrupted single rescuer cardiopulmonary resuscitation (CPR) (5 cycles of both compressions and ventilations) on an adult resuscitation manikin placed on the floor

- performed at least 2 minutes of uninterrupted single rescuer CPR (5 cycles both compressions and ventilations) on an infant resuscitation manikin placed on a firm surface
- responded appropriately in the event of regurgitation or vomiting
- managed the unconscious breathing casualty
- followed single rescue procedure, including the demonstration of a rotation of operators with minimal interruptions to compressions
- followed the prompts of an Automated External Defibrillator (AED)
- Responded to at least three simulated first aid scenarios contextualised to the candidate's remote and/or isolated situation:
 - demonstrated safe manual handling techniques
 - conducted a visual and verbal secondary survey assessment of the casualty
 - assessed vital signs, including respirations, pulse and temperature
 - post-incident debrief and evaluation
 - provided an accurate verbal and written report of the incident
- Applied first aid response in a remote situation for the following:
 - allergic reaction
 - anaphylaxis
 - basic care of a wound
 - bleeding control
 - choking and airway obstruction
 - envenomation, using pressure immobilisation
 - environmental impacts, including hypothermia, hyperthermia, dehydration and heat stroke
 - fractures, sprains and strains, using arm slings, roller bandages or other appropriate immobilisation techniques
 - head, neck and spinal injuries, using immobilisation principles
 - respiratory distress, including asthma
 - shock

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge required to effectively complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the work role. This includes knowledge of:

- State/Territory regulations, first aid codes of practice and workplace procedures including:
 - ARC guidelines relevant to provision of CPR and first aid
 - safe work practices to minimise risks and potential hazards
 - infection control principles and procedures, including use of standard precautions
 - requirements for currency of skill and knowledge
- legal, workplace and community considerations including:

- awareness of potential need for stress-management techniques and available support following an emergency situation
- duty of care requirements
- respectful behaviour towards a casualty
- own skills and limitations
- consent
- privacy and confidentiality requirements
- importance of debriefing
- considerations when providing first aid, including:
 - airway obstruction due to body position
 - appropriate duration and cessation of CPR
 - appropriate use of an AED
 - chain of survival
 - standard precautions
 - how to conduct a visual and verbal secondary survey assessment
 - assessment and interpretation of vital signs, including respirations, temperature and pulse
- principles and procedures for first aid management of the following scenarios, contextualised to the candidate's remote and/or isolated situation:
 - abdominal injuries
 - allergic reaction
 - anaphylaxis
 - basic care of a wound
 - bleeding control
 - burns
 - cardiac conditions, including chest pain
 - choking and airway obstruction
 - crush injuries
 - diabetes
 - dislocations
 - drowning
 - envenomation
 - environmental impact, including hypothermia, hyperthermia, dehydration and heat stroke
 - eye and ear injuries
 - febrile convulsions
 - fractures
 - head, neck and spinal injuries
 - minor skin injuries
 - needle stick injuries

- poisoning and toxic substances
- respiratory distress, including asthma
- seizures, including epilepsy
- shock
- soft tissue injuries, including sprains and strains
- stroke
- unconsciousness
- remote considerations in the provision of first aid, including:
 - typical hazards and strategies for preparing supplies to address contingencies
 - management options relating to transporting casualty, including aero-medical evacuation
 - how to identify and prepare areas for safe evacuation, including aero-medical evacuation
 - how and when to access emergency response services
 - communication systems, equipment and methods available in remote situations
 - priorities of management in first aid when dealing with life-threatening conditions
 - specific considerations contextualised to alpine, desert, marine, rural/remote settings and tropical environments
- basic anatomy and physiology relating to:
 - how to recognise a person is not breathing normally
 - chest
 - response/consciousness
 - upper airway and effect of positional change
 - considerations in provision of first aid for specified conditions, including specific considerations for remote settings

Assessment Conditions

Skills must be demonstrated working individually in an environment that provides realistic in-depth, industry-validated scenarios and simulations to assess candidates' skills and knowledge.

- Assessment resources must include:
 - adult and infant resuscitation manikins in line with ARC Guidelines for the purpose of assessment of CPR procedures
 - adrenaline auto-injector training device
 - AED training device
 - placebo bronchodilator and spacer device
 - roller bandages
 - thermometer
 - triangular bandages
 - workplace First Aid kit suitable for remote locations

- workplace injury, trauma and/or illness record, or other appropriate workplace incident report form
- wound dressings

Simulated assessment environments must simulate the real-life working environment where these skills and knowledge would be performed, with all the relevant equipment and resources of that working environment.

Assessor requirements

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ced1390f-48d9-4ab0-bd50-b015e5485705>

ICPPRP3220 Digitise images for reproduction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICP Printing and Graphic Arts Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to scan images, including line-art, greyscale and colour originals.

It applies to individuals who design and prepare layouts and artwork, manipulate images and text, and apply solutions to a defined range of problems.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Pre-Press

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare for job | 1.1 Identify job specifications 1.2 Scale original image 1.3 Clean and prepare work surfaces and confirm images are dust free 1.4 Mount original image according to enterprise procedures |
| 2. Prepare scanner | 2.1 Set up scanner and calibrate according to manufacturer specifications 2.2 Enter data from copy evaluation onto scanner 2.3 Select scanner software |
| 3. Produce images | 3.1 Identify medium being scanned 3.2 Confirm disk capacity is sufficient for the job |

| ELEMENT | PERFORMANCE CRITERIA |
|---------|---|
| | 3.3 Set and check processor according to job specifications 3.4 Scan images according to work health and safety (WHS) requirements 3.5 Check scanned images against technical specifications of job and make required adjustments |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Reading | <ul style="list-style-type: none">Identifies and evaluates text to establish job requirements |
| Numeracy | <ul style="list-style-type: none">Analyses a range of mathematical information used in familiar and routine tasks |
| Self-management | <ul style="list-style-type: none">Complies with enterprise requirements and follows organisational procedures within scope of own roleTakes responsibility for planning and organising own workload, and initiates standard procedures when responding to familiar problems |
| Planning and organising | <ul style="list-style-type: none">Determines priorities and sequences steps involved in clearly defined, familiar tasks, and assembles required resources |
| Technology | <ul style="list-style-type: none">Identifies purposes, specific functions and key features of common digital systems and tools and operates them as required |

Unit Mapping Information

Supersedes and is equivalent to ICPPRP322 Digitise images for reproduction.

Links

Companion Volume Implementation Guide is found on VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d>

Assessment Requirements for ICPPRP3220 Digitise images for reproduction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICP Printing and Graphic Arts Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of the unit, including evidence of the ability to:

- use a full colour digital device to reproduce:
 - one line-art
 - one greyscale
 - one colour transparency (positive)
 - one colour reflective
 - one negative
 - one re-screen.

In the course of the above, the candidate must:

- comply with work health and safety (WHS) requirements for digital devices
- identify and select the settings on the digital device to meet job requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- scanner settings for printing processes and electronic media
- procedures for calibration of scanner
- colour mixing principles and separation requirements for:
 - primary colours
 - tone gradation and grey balance
- procedures for colour correction
- factors that contribute to, and methods for minimising, colour separation
- requirements for screen ruling and dot percentage
- impact of output resolution on final screen ruling

- WHS requirements for operating a scanner and handling solvents in the workplace
- manufacturer manuals, enterprise procedures and WHS and other documentation relevant to the task, including location and purpose.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry. Noise levels, production flow, interruptions and time variances must be typical of those experienced in the area of work.

This includes access to:

- scanner
- industry standard computer hardware and software.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d>

ICPPRP422 Digitise complex images for reproduction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICP Printing and Graphic Arts Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to undertake advanced, complex colour scanning or digital capture.

It applies to individuals who work in the graphic pre-press sector of the printing and graphic arts industry. They are responsible for image production that meets the technical specifications of the job.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Pre-Press

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1 Mount and prepare original copy | 1.1 Copy is mounted and positioned according to scanner/artwork specifications 1.2 Crops are marked to minimise use of disk space 1.3 Multiple copy units are correctly identified and assigned according to technical specifications |
| 2 Set up and adjust scanner | 2.1 Scanner is calibrated and program set according to job specifications |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------------|---|
| | <p>2.2 Colourcast and catch lights are assessed to ensure image is scanned according to job specifications</p> <p>2.3 Adjustments are made to tone and colour correction requirements</p> <p>2.4 End points are set</p> <p>2.5 Scanner settings are utilised to achieve required results for varied print processes</p> |
| 3 Produce and evaluate complex images | <p>3.1 Images are scanned using appropriate software commands and scanner controls</p> <p>3.2 Scanned images are evaluated for colour and grey balance, tone reproduction, cast removal and end-point accuracy</p> <p>3.3 Images are stored on file and displayed on a monitor or output device according to job specifications</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|-------------------|---------------------------|---|
| Reading | 1.1, 1.3, 2.1, 2.2, 3.3 | <ul style="list-style-type: none"> Recognises and interprets text to establish job requirements from information contained within relevant procedures and specifications |
| Get the work done | 1.1-1.3, 2.1-2.5, 3.1-3.3 | <ul style="list-style-type: none"> Takes responsibility for planning and organising own workload using analytical processes to decide a course of action, and assembles required resources Recognises and takes responsibility for addressing predictable, and some less predictable, problems in familiar work contexts Utilises a broad range of digital software features for specific purposes |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|--|---|--------------------|
| ICPPRP422 Digitise complex images for reproduction | ICPPP422C Digitise complex images for reproduction | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d>

Assessment Requirements for ICPPRP422 Digitise complex images for reproduction

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICP Printing and Graphic Arts Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- safely use a medium to high-end full colour scanner (with full software capabilities) to reproduce at least TWO colour continuous tone originals with different contrast characteristics and ONE rescreen
- provide high-quality colour, grey balance, tone reproduction and cast removal in scanned images
- match technical aspects of scanned image to selected printing process and substrate
- safely operate and monitor production on a flat-bed or drum scanner with full colour capabilities
- find and use information relevant to the task from a variety of information sources.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain why scanner settings need to be varied to suit subsequent printing processes or electronic output
- list factors that influence selection of highlight and shadow aim points
- describe critical qualities of a copy that need evaluation prior to reproduction
- explain main points to be considered when preparing a copy for scanning
- describe how grey balance requirements are determined prior to applying colour correction
- describe factors that determine requirement for colour correction
- describe purpose of catchlight controls and how they are applied
- describe considerations necessary to ensure predictability and repeatability at the output stage

- list methods of storage and filing of images for retrieval
- explain criteria used for evaluating scanned images
- explain how common file formats relate to the scan saving process
- identify other file formats available for saving scans and when they are used
- identify manuals, safety and other documentation relevant to this task and where are they kept, and information included in them
- identify other sources of available information.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Noise levels, production flow, interruptions and time variances must be typical of those experienced in the Pre-Press field of work and include access to:

- a flat-bed or drum scanner with full colour capabilities
- industry software packages.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a74b7a0f-a253-47e3-8be0-5d426e24131d>

ICTICT211 Identify and use basic current industry specific technologies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to engage in basic ongoing review and research of industry specific technologies in order to identify and apply these technologies or techniques to improve aspects of an organisation's activities.

It applies to individuals who work under minimal supervision and are responsible for ensuring that the quality of the business process is maintained at the highest level possible, through the appropriate application of industry specific technologies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

General ICT

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to use basic industry specific technologies | 1.1 Identify technologies specific to an industry sector 1.2 Acquire and use the industry specific technologies 1.3 Identify, classify and use industry specific technologies for the benefit of the organisation |
| 2. Use basic industry | 2.1 Conduct testing of industry specific technologies |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| specific technologies to assist in solving organisational problems | 2.2 Use features and functions of industry specific technologies within an organisational context 2.3 Demonstrate depth of knowledge of enabling technologies to an accepted industry standard 2.4 Access and use sources of information relating to the industry specific technologies |
| 3. Evaluate performance of basic industry specific technology | 3.1 Evaluate industry specific technologies for performance, usability and benefit to the organisation 3.2 Determine environmental considerations involved when using the technology 3.3 Seek feedback from users where appropriate |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|------------------------------|--|
| Learning | 1.1-1.3, 2.3, 2.4 | <ul style="list-style-type: none"> Investigates, evaluates and applies information from a range of complex and technical texts to expand own knowledge and identify industry specific technologies that will benefit the organisation |
| Reading | 1.1, 1.3, 2.1, 2.4, 3.2, 3.3 | <ul style="list-style-type: none"> Identifies and interprets technical online and hard copy documentation containing complex terminology and diagrams to identify industry specific technologies that will benefit the organisation, and to determine environmental considerations |
| Oral Communication | 1.1-1.3, 2.4, 3.1-3.3 | <ul style="list-style-type: none"> Elicits information and feedback by using effective listening and questioning techniques to identify and evaluate industry specific technologies Uses clear, easy-to-understand language, and translates industry specific terminology into plain English where necessary |
| Navigate the world of work | 2.3, 3.2 | <ul style="list-style-type: none"> Recognises organisational expectations and follows explicit protocols and procedures |
| Get the work done | 1.1-1.3, 2.1-2.4, 3.1 | <ul style="list-style-type: none"> Determines priorities and sequences the steps involved in clearly defined familiar tasks, and |

| | | |
|--|--|---|
| | | identifies and assembles the resources required <ul style="list-style-type: none">• Demonstrates the purposes, specific functions and key features of common digital systems and tools, and operates them effectively to complete routine tasks |
|--|--|---|

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|-----------------------|
| ICTICT211 Identify and use basic current industry specific technologies | ICAICT211A Identify and use basic current industry specific technologies | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTICT211 Identify and use basic current industry specific technologies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- identify basic new and emerging industry specific technologies and techniques
- use basic features and functions of identified industry specific technologies to an industry standard.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline current technology trends and directions in information and communications technology (ICT), and specifically of the major industry technology standards used in the specified area
- outline vendor product directions
- describe current industry hardware and software products, with broad knowledge of general features and capabilities, and their application
- outline information gathering techniques.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Noise levels, production flow, interruptions and time variances must be typical of those experienced in the general ICT industry, and include access to:

- a site where industry specific technologies may be used
- industry specific technologies currently used in industry
- documents detailing work health and safety (WHS) standards, environmental guidelines and organisational requirements.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

ICTICT221 Identify and use specific industry standard technologies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Application

This unit describes the skills and knowledge required to engage in a basic ongoing review and research of industry specific technologies in order to identify and apply these technologies and techniques to improve aspects of an organisation's activities.

It applies to individuals who work under supervision and are involved in ensuring that the quality of business processes are maintained at a high level through application of industry specific technologies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

General ICT

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to use industry specific technologies | 1.1 Identify organisational technology upgrades and advancement requirements 1.2 Identify technologies required to meet organisational requirements 1.3 Classify industry specific technologies according to organisational requirements |
| 2. Implement industry specific technologies | 2.1 Implement and test industry specific technologies according to task requirements 2.2 Use features and functions of industry specific technologies |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| | <p>according to task requirements</p> <p>2.3 Access and use sources of information according to task requirements</p> |
| 3. Evaluate performance of basic industry specific technology | <p>3.1 Evaluate performance, usability and benefit to organisation of implemented technologies</p> <p>3.2 Determine and document environmental considerations of implemented technologies</p> <p>3.3 Seek and respond to user according to organisational requirements</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|--------------------|--|
| Learning | <ul style="list-style-type: none"> Investigates, evaluates and applies information from a range of technical texts to expand own knowledge and identify industry specific technologies |
| Oral communication | <ul style="list-style-type: none"> Uses listening and questioning techniques to obtain information and feedback and identify and evaluate industry specific technologies |
| Reading | <ul style="list-style-type: none"> Interprets technical online and hard copy documentation containing complex terminology and diagrams Interprets technical information to identify industry specific technologies and determines environmental considerations |
| Self-management | <ul style="list-style-type: none"> Organises own workload aligned to organisational expectations and follows explicit protocols and procedures Identifies priorities and sequences involved in defined tasks and assembles required resources |
| Technology | <ul style="list-style-type: none"> Identifies purposes, specific functions and key features of basic digital systems and tools and operates them |

Unit Mapping Information

Supersedes and is equivalent to ICTICT211 Identify and use basic current industry specific technologies.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTICT221 Identify and use specific industry standard technologies

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify, implement and evaluate at least three industry standard technologies
- use at least one feature and at least one function of each industry standard technology above.

In the course of the above, the candidate must:

- comply with task and organisational requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- industry standard technology trends and directions in Information and Communications Technology (ICT), and major industry technology standards used in specified area
- vendor product directions
- industry standard hardware and software products and their general features and capabilities
- information gathering methodologies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- required industry standard technologies, features and functions that may assist in identifying and using specific industry standard technologies
- required hardware, software and its components.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

ICTICT517 Match ICT needs with the strategic direction of the organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 4.0. |

Application

This unit describes the skills and knowledge required to ensure information and communications technology (ICT) products and systems match the strategic direction of the organisation.

It applies to individuals whose responsibilities may include improving, evaluating, acquiring, maintaining and supporting ICT for organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

General ICT

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate current strategic plan and propose changes | 1.1 Analyse and document current strategic plan of organisation against industry environment and organisational objectives 1.2 Determine and document current state of ICT systems and practices in organisation 1.3 Compare strategic plan objectives and current state of ICT to determine ICT gaps, improvement opportunities, and proposed changes |

| | |
|-----------------------------------|--|
| | 1.4 Report on proposed changes, gaps and improvement opportunities to superior |
| 2. Evaluate effect of changes | <p>2.1 Evaluate impact of proposed changes to ICT systems and products against strategic objectives of organisation</p> <p>2.2 Evaluate the difficulty of implementing proposed changes to ICT systems and products</p> <p>2.3 Prioritise proposed changes to refine opportunities and assist in scheduling implementation</p> <p>2.4 Document evaluation process and provide to superior for feedback</p> |
| 3. Plan implementation of changes | <p>3.1 Develop action plan to implement proposed changes including prioritised schedule and consistency with organisational policy and procedures</p> <p>3.2 Detail standards, targets and implementation methods in action plan</p> <p>3.3 Provide action plan to superior for feedback and approval</p> |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|----------------------------|---|
| Reading | <ul style="list-style-type: none"> Reviews, analyses and evaluates complex online and hard copy documentation containing ICT specific terminology, diagrams and numerical information to determine ICT gaps and improvement opportunities |
| Writing | <ul style="list-style-type: none"> Uses plain English, together with vocabulary, grammatical structures, terminology, diagrams, numerical information, formatting and structure relevant to the job role and organisation |
| Oral Communication | <ul style="list-style-type: none"> Uses plain English, translating technical terminology when necessary, to communicate with a range of personnel and determine objectives, articulate ideas and requirements, and develop plans Elicits information using effective listening and questioning techniques |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical data and applies mathematical calculations to assess the financial implications of introducing changes |
| Navigate the world of work | <ul style="list-style-type: none"> Accepts responsibility and ownership for the task and makes decisions according to organisational needs and the need for coordination with |

| | |
|----------------------|--|
| | others <ul style="list-style-type: none"> • Takes personal responsibility for following explicit and implicit policies, procedures and legislative requirements |
| Interact with others | <ul style="list-style-type: none"> • Selects and uses appropriate conventions and protocols when communicating with clients and colleagues in a range of work contexts • Recognises and accommodates basic differences and priorities of others • Cooperates with others and contributes to work practices where joint outcomes are expected and deadlines are to be met |
| Get the work done | <ul style="list-style-type: none"> • Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others and taking into account capabilities, efficiencies and effectiveness • Applies systematic and analytical decision making processes for complex and non-routine situations • Investigates new and innovative ideas as a means to continuously improve work practices and processes through consultation and formal and analytical thinking • Uses and investigates new digital technologies and applications to manage and manipulate data and communicate effectively with others in a secure and stable digital environment |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|--|---|--------------------|
| ICTICT517 Match ICT needs with the strategic direction of the organisation | ICTICT511 Match ICT needs with the strategic direction of the enterprise | Edits to title, application, elements 1–3, assessment requirements and foundation skills to clarify intent and scope. | Equivalent unit |

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTICT517 Match ICT needs with the strategic direction of the organisation

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 4.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements and performance criteria of this unit; including evidence of the ability to:

- For one organisation:
 - interpret a strategic plan and objectives of the organisation
 - evaluate the current state of ICT in the organisation
 - identify possible gaps and opportunities in ICT and evaluate organisational impact with reference to the strategic plan and the objectives
 - determine and prioritise proposed changes to meet organisational needs
 - evaluate the difficulty of implementing proposed changes
 - develop an action plan for implementation

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes:

- Key sections of an action plan for ICT implementation projects
- Methods of evaluation and planning approaches to technical problems and strategic objectives
- Methods of evaluation of competing and complementary internal and external ICT systems and products
- Current and emerging system and product trends and directions

Assessment Conditions

Skills must be demonstrated in a workplace or simulated environment where conditions are typical of those in an ICT working environment or ICT workplace. This includes:

- A site where ICT needs and strategic directions of the organisation are coordinated
- Detailed information relating to a strategic organisation plan, objectives, and direction

- Organisational policies and procedures relating to the implementation of ICT changes
- Individual superior in the organisation
- Information on current ICT systems and practices in the organisation including operating systems, hardware, and security

Assessors of this unit must satisfy the assessor requirements in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guides are available from VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

ICTICT526 Verify client business requirements

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Application

This unit describes the skills and knowledge required to deal with clients at a senior level, to identify their business requirements and verify the accuracy of the information gathered.

The unit applies to senior Information and Communications Technology (ICT) personnel operating with a high degree of autonomy for managing activities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

General ICT

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish business relationship | 1.1 Identify organisational structure, culture and politics in relation to support requirements 1.2 Identify internal and external organisational stakeholders 1.3 Develop business relationship with client 1.4 Schedule regular liaisons with client to manage relationship |
| 2. Determine context of business need or problem | 2.1 Work with client to define business problem to be investigated 2.2 Establish system boundaries and scope according to business requirements 2.3 Manage preparation of required information |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|---|
| | gathering 2.4 Confirm that project objectives and outcomes are documented 2.5 Work with client to substantiate documentation |
| 3. Source and analyse information | 3.1 Supervise information gathering from identified clients of system 3.2 Analyse gathered client responses according to business information needs 3.3 Analyse new system requirements according to business information needs 3.4 Confirm that new system requirements and problems have been documented |
| 4. Confirm system specifications | 4.1 Review system specifications documentation with client 4.2 Work with client to verify system specifications, updating documentation as required 4.3 Obtain final approval and sign-off from client |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|--------------------|--|
| Reading | <ul style="list-style-type: none"> Identifies, analyses and evaluates complex and technical online and hard copy documentation containing specific terminology, diagrams and numerical information to identify organisational requirements, analyse business problems and identify solutions |
| Writing | <ul style="list-style-type: none"> Uses questioning strategies, avoiding loaded or leading questions, when developing information gathering documentation Uses grammatical structures and terminology, diagrams and flow charts, numerical information, and formatting and document structure relevant to the job role and organisation to record new system requirements and associated risks |
| Oral Communication | <ul style="list-style-type: none"> Participates in a verbal exchange of ideas and solutions and uses detailed and clear language to clarify and present information according to requirements and audience |
| Numeracy | <ul style="list-style-type: none"> Interprets numerical information and applies mathematical calculations relating to time durations and budgetary information |
| Planning and | <ul style="list-style-type: none"> Uses a combination of formal and logical planning processes and an |

| Skill | Description |
|-----------------|--|
| organising | increasingly intuitive understanding of context to evaluate appropriate solutions |
| Self-management | <ul style="list-style-type: none">• Takes responsibility for high-impact decisions in complex situations involving many variables and constraints |
| Technology | <ul style="list-style-type: none">• Recognises and identifies the strategic and operational potential of digital trends to achieve work goals, enhance work processes, create opportunities and reduce risks |

Unit Mapping Information

Supersedes and is equivalent to ICTICT515 Verify client business requirements.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTICT526 Verify client business requirements

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- verify project specific information for a client on at least one occasion, including:
 - establishing business relationships through investigation of the organisation and interviews with client and staff
 - determining and documenting business expectations and needs, including critical business requirements
 - working with clients and staff to gather, analyse and confirm information contributions
 - reviewing and gaining approval for system specifications.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- process for communicating with client in order to gather and report data
- client business requirements relating to Information and Communications Technology (ICT) product selection
- process used to identify products related to the business
- roles and responsibilities of stakeholders.

Assessment Conditions

conditions are typical of those in a working environment in this industry.

This includes access to:

- client expectations brief
- business objectives
- systems, data gathering and appropriate software products.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

ICTICT612 Develop contracts and manage contract performance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Application

This unit describes the skills and knowledge required to negotiate and document contractual arrangements between clients and vendors and to monitor and manage performance against agreed contractual obligations.

The unit applies to those in senior Information and Communications Technology (ICT) management roles who are required to contract both staff and suppliers.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

General ICT

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Establish contract | 1.1 Determine and document boundaries of the contract according to organisational requirements 1.2 Determine and document contract requirements according to organisational requirements 1.3 Determine and document required performance criteria 1.4 Obtain client and vendor feedback to clarify problems |
| 2. Monitor performance and facilitate negotiations | 2.1 Confirm implementation of contractual obligations 2.2 Confirm and document performance against required performance criteria and contractual |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | obligations 2.3 Facilitate negotiations to resolve problems and misunderstandings |
| 3. Conclude performance outcomes and recommendations | 3.1 Determine and document organisational alignment to documented performance 3.2 Determine and document unsatisfactory performance 3.3 Determine and document recommendations for contractual variations 3.4 Submit document to required personnel and seek and respond to feedback |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|---|
| Numeracy | <ul style="list-style-type: none"> Draws from a range of mathematical and financial calculations to determine and monitor contractual milestones, costs and budgetary constraints |
| Oral communication | <ul style="list-style-type: none"> Demonstrates use of listening and probing and open questioning techniques to elicit the views and opinions of others and obtain information and feedback |
| Reading | <ul style="list-style-type: none"> Analyses a variety of organisational documentation, vendor and client information, technical specifications and financial data |
| Writing | <ul style="list-style-type: none"> Integrates information and requirements from a number of sources using correct spelling and grammar, specialised and cohesive language and formal contract documentation structures |
| Teamwork | <ul style="list-style-type: none"> Demonstrates active identification of the requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience |
| Planning and organising | <ul style="list-style-type: none"> Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer term operational and strategic goals |
| Problem solving | <ul style="list-style-type: none"> Demonstrates an understanding of context to identify anomalies and subtle deviations to normal expectations, focussing attention on critical issues and variables and filtering out peripheral issues |
| Technology | <ul style="list-style-type: none"> Recognises and identifies strategic and operational potential of digital trends to achieve work goals, enhance work processes, |

| Skill | Description |
|-------|---------------------------------------|
| | create opportunities and reduce risks |

Unit Mapping Information

Supersedes and is equivalent to ICTICT602 Develop contracts and manage contracted performance.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTICT612 Develop contracts and manage contract performance

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- negotiate and formulate at least one contract.

In the course of the above, the candidate must:

- document processes and outcomes
- monitor performance outcomes.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- industry standard analysis and planning approaches to technical problems and management requirements including:
 - organisational values
 - purpose in context of formulating contracts
- methods for evaluating and forecasting vendor and technology trends
- contracting requirements related to Information and Communications Technology (ICT)
- methods of purchasing ICT equipment and services, such as negotiating extensive organisational support contracts
- industry standards in relation to service and product agreements.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational policies and procedures
- industry standard service and product agreements
- detailed information relating to business strategic plan and objectives.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

ICTICT616 Develop communities of practice

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Application

This unit describes the skills and knowledge required to identify areas that would benefit from communities of practice (CoPs) and to develop communities.

The unit applies to senior Information and Communications Technology (ICT) management professionals responsible for teams and their output.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

General ICT

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Identify community of practice requirements | 1.1 Develop and document organisational knowledge map 1.2 Identify existing informal communities of practice (CoPs) 1.3 Determine and document needs and benefit of CoPs 1.4 Identify groups in disparate areas that share work goals |
| 2. Devise spaces for involvement | 2.1 Research and determine electronic meeting space according to group requirements 2.2 Search and secure shared storage in public and private areas 2.3 Enable group mailing capability 2.4 Enable other required technical facilitators |

| ELEMENT | PERFORMANCE CRITERIA |
|----------------------------------|---|
| 3. Invite participation | 3.1 Publicise and promote CoP collaborative tools according to group requirements 3.2 Host and invite required personnel to group events 3.3 Allow new groups to coalesce 3.4 Accept different levels of participation |
| 4. Assist evolution of community | 4.1 Facilitate regular contact within CoPs 4.2 Enable evolution of CoPs 4.3 Seek feedback from group participants and change CoP accordingly |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| Skill | Description |
|-------------------------|--|
| Learning | <ul style="list-style-type: none"> Actively identifies, creates and utilises linkages to enhance knowledge sharing, idea creation, individual and collective engagement and work outcomes |
| Oral communication | <ul style="list-style-type: none"> Uses the appropriate tone of voice, encouraging body language, plain English and a courteous manner when encouraging participation and facilitating CoPs |
| Reading | <ul style="list-style-type: none"> Identifies and reviews a wide variety of text sourced from organisational documentation, electronic meeting places and the organisational knowledge bank to determine relevant and key information |
| Writing | <ul style="list-style-type: none"> Uses persuasive writing, correct spelling, appropriate grammatical structures and a broad range of vocabulary, including idioms, colloquialisms and technical terminology, and applies document structures suitable to the document type |
| Teamwork | <ul style="list-style-type: none"> Fosters a collaborative culture within own sphere of influence, facilitating a sense of commitment and cohesion, and highlighting and using the strengths of those involved |
| Planning and organising | <ul style="list-style-type: none"> Takes responsibility for defining key aspects of own workload, balancing own needs and priorities with those of the work group |
| Problem solving | <ul style="list-style-type: none"> Actively identifies systems, devices and applications with potential to meet current and future needs |

Unit Mapping Information

Supersedes and is equivalent to ICTICT606 Develop communities of practice.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTICT616 Develop communities of practice

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify, map and facilitate a community of practice (CoP) with more than three people.

In the course of the above, the candidate must:

- facilitate effective interaction and communicate within the group
- define purpose and intent of a CoP.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- ‘communities of practice’ features and purpose
- organisational structures, goals and knowledge and how they apply to CoPs
- communications enabling technologies that apply to developing communities of practice
- group dynamics and its impact on building CoPs in an organisational setting
- methodologies to promote, market and engage with CoPs and the enabling technologies.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- an organisational structure, goals and knowledge
- a site where CoP may be developed
- personnel that forms a community
- user device.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

ICTSAS305 Provide ICT advice to clients

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to provide information and communications technology (ICT) advice and support to clients, including the communication of comprehensive technical information.

It applies to frontline technical support individuals who work under a level of supervision but have responsibility for providing technical support.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Systems administration and support

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Review client support issues | 1.1 Check for new problems logged by client 1.2 Check previous logs for similar problems or requests from client 1.3 Investigate and document support issues affecting client 1.4 Notify client of the results of investigation and provide advice and support on findings |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| | 1.5 Obtain client feedback and make changes |
| 2. Provide advice on software, hardware or network | 2.1 Confirm software, hardware or network requirements with client 2.2 Investigate and document a solution 2.3 Document additional requirements identified in the investigation and refer them to the client 2.4 Obtain approval from client to implement the solution 2.5 Investigate and document amount of technical support client may require 2.6 Discuss and agree level of technical support identified with client 2.7 Arrange time with client when support will take place 2.8 Provide technical support as part of group or one-to-one instruction to the client 2.9 Provide manuals and help documentation to client |
| 3. Obtain client feedback | 3.1 Create an appropriate evaluation or feedback form or other mechanism to gather feedback about solution and support provided 3.2 Provide client with instructions on how to complete form or use other means of providing feedback 3.3 Distribute evaluation or feedback to client 3.4 Review feedback from client to identify areas for improvement |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|-----------------------------|--|
| Reading | 1.1-1.3, 1.5, 2.2, 2.5, 3.4 | <ul style="list-style-type: none"> Interprets and evaluates information to compare technical specifications, identify areas of improvement and recognise solutions to new and emerging issues |
| Writing | 1.3-1.5, 2.2, 2.3, 2.5, | <ul style="list-style-type: none"> Uses written vocabulary, grammatical structures and conventions to accurately convey instructions and |

| | | |
|----------------------|--|--|
| | 2.9, 3.1-3.4 | record complex information |
| Oral Communication | 1.2, 1.4, 1.5, 2.1, 2.4-2.8 | <ul style="list-style-type: none"> Participates in verbal exchange of ideas/solutions using detailed and clear language to contribute information for discussion and confirm client requirements Varies content, structure, style, tone and vocabulary to suit the needs of audiences |
| Interact with others | 1.4, 1.5, 2.1, 2.3, 2.4, 2.6-2.9, 3.2, 3.3 | <ul style="list-style-type: none"> Participates in routine conversations directly relevant to role, responding and contributing in appropriate ways when providing advice to clients and receiving feedback Shares information and resources, offers assistance voluntarily and provides feedback on others' work when providing client support |
| Get the work done | 1-1-1.3, 1.5, 2.2-2.5, 2.7, 3.1-3.4 | <ul style="list-style-type: none"> Plans a range of routine, and some non-routine, tasks, accepting stated goals and aiming to achieve them efficiently when obtaining feedback from client Implements actions as per plan, making slight adjustments if necessary, and addressing some unexpected issues Selects from a range of predetermined options in routine situations, identifying and taking some situational factors into account Applies formal problem solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action Understands key principles and concepts that underpin the design and operation of digital systems and tools |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|--|--|-----------------------|
| ICTSAS305 Provide ICT advice to clients | ICTSAS305A Provide IT advice to clients | Updated to meet Standards for Training Packages. | Equivalent unit |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--------------------------------------|---------------------------------------|-------------------------------------|-----------------------|
| | | Minor edit to the competency title. | |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTSAS305 Provide ICT advice to clients

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 1.0. |

Performance Evidence

Evidence of the ability to:

- investigate client support requests and provide a documented solution after consultation with client
- convey comprehensive technical information to clients in a clear, concise, jargon-free and coherent manner
- use technical manuals and 'help' documentation.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- identify and describe the available in-house and vendor support
- explain contract and service agreements with vendors
- identify features of different types of hardware supported by the organisation
- identify sources of information relevant to the provision of services and support
- identify operating system:
 - functions and basic features
 - supported by the organisation
- identify and describe security and network guidelines and procedures
- identify the advanced features of software, including the functions and support provided by the organisation.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Noise levels, production flow, interruptions and time variances must be typical of those experienced in the systems administration and support field of work and include access to:

- peers and supervisors for obtaining information
- relevant information sources
- technical records and documentation.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

ICTSAS432 Identify and resolve client ICT problems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Application

This unit describes the skills and knowledge required to identify, record, prioritise and resolve client Information and Communications Technology (ICT) support activities and escalate as required.

It applies to experienced individuals who use specialised and technical knowledge to take responsibility in providing client-based ICT support to end users in an office or working environment.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Systems administration and support

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to resolve client ICT problems | <ul style="list-style-type: none">1.1 Determine client problems and impact of problem according to organisational procedures1.2 Document client response according to organisational policies and procedures1.3 Examine logged requests and determine requirements1.4 Confirm additional information with client and respond to new information according to organisational procedures1.5 Refer to database of known problems and identify resolution options1.6 Establish and record required constraints |

| ELEMENT | PERFORMANCE CRITERIA |
|-----------------------------------|--|
| 2. Prioritise client ICT problems | 2.1 Undertake impact analysis of problem and determine severity and risks 2.2 Prioritise problem according to organisational procedures 2.3 Provide problem resolution advice and support to client |
| 3. Refer problems where required | 3.1 Investigate and refer problems to third parties according to organisational procedures 3.2 Provide third party with client and problem details as required 3.3 Document advice and support provided by third party according to organisational procedures |
| 4. Carry out maintenance | 4.1 Obtain required components for resolution according to organisational procedures 4.2 Complete maintenance according to organisational procedures 4.3 Store and dispose of used components according to organisational environmental guidelines |
| 5. Create maintenance report | 5.1 Prepare maintenance report according to organisational procedures 5.2 Finalise maintenance report and acquire internal sign off 5.3 Distribute maintenance report to client and seek and respond to client feedback as required |
| 6. Confirm problem resolution | 6.1 Obtain and respond to client feedback 6.2 Confirm client requirements have been met 6.3 Resolve outstanding client requirements and escalate as required 6.4 Forward client feedback to required personnel for sign-off and record in problems database |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|---------|--|
| Reading | <ul style="list-style-type: none">Interprets technical specifications and numerical data from a range of documentation and sources to assist in rectifying problems |
| Writing | <ul style="list-style-type: none">Uses clear language and formats required for the audience to convey explicit technical information, requirements and recommendations |

| | |
|--------------------|---|
| Oral Communication | <ul style="list-style-type: none">• Uses inclusive questioning techniques to obtain information from clients and provides precise advice and information to others |
| Teamwork | <ul style="list-style-type: none">• Selects and uses required conventions and protocols when communicating with client and others in a range of work contexts |
| Problem solving | <ul style="list-style-type: none">• Uses formal analytical thinking techniques for identifying issues and generating solutions, seeking input from others as required |
| Self-management | <ul style="list-style-type: none">• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes |
| Technology | <ul style="list-style-type: none">• Uses main features and functions of digital tools to complete work tasks |

Unit Mapping Information

Supersedes and is equivalent to ICTSAS410 Identify and resolve client ICT problems.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTSAS432 Identify and resolve client ICT problems

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- identify, record, prioritise and resolve a client ICT problem on at least two separate occasions.

In the course of the above, the candidate must:

- record and prioritise client support activities
- determine required resources for maintenance activities
- prioritise client ICT problems, using an impact analysis of the problem
- complete maintenance activities
- resolve client problems and escalate according to organisational guidelines and practices
- refer problems to third parties where required
- prepare, finalise and distribute maintenance report, including information about problems and resolution action
- provide advice to the client and seek and record client feedback
- store and dispose used components.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- hardware and software products:
 - in use
 - supported by the organisation
- organisational procedures, including:
 - problem prioritisation
 - third party support and documentation

- maintenance procedures
- maintenance report preparation and distribution
- sustainable practices consistent with ICT industry
- environmental guidelines that may apply to identifying and resolving client ICT problems
- help desk or service desk structure and escalation procedures
- key functions and basic features of operating system
- organisational structure of workplace that may be relevant to identifying and resolving client ICT problems
- workplace security and network guidelines and procedures.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- special purpose tools, equipment and materials for maintenance
- industry software packages
- a range of industry hardware, software and diagnostic tools
- technical records
- organisational guidelines
- vendor documentation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

ICTWEB306 Develop web presence using social media

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Application

This unit describes the skills and knowledge required to develop and drive social media traffic to an established website using social media platforms. It involves comparing, configuring and using different types of social networking tools and applications to increase web presence.

It applies to individuals in Information and Communications Technology (ICT) roles and use social media tools and applications in business environments

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Web

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Prepare to use social media tools and applications | <ul style="list-style-type: none">1.1 Establish social media requirements according to business specifications1.2 Identify and analyse characteristics of social media platforms, tools and applications1.3 Identify issues associated with social media tools and applications according to organisational guidelines and policies1.4 Compare and discuss purpose and effect of social media platforms, tools and applications with required personnel |

| | |
|--|--|
| | 1.5 Compare and review tools and features of different social media platforms, tools and applications |
| 2. Set up and use social media tools and applications | 2.1 Identify social media tools and applications according to business specifications 2.2 Initiate and configure preferred social media tools and applications for use 2.3 Establish social media interface, using text and file content 2.4 Set up accounts for required users according to organisational procedures 2.5 Initiate social networking interaction and confirm security of collaboration 2.6 Link social media and web presence and create content as required |
| 3. Review use of social media tools and application in developing web presence | 3.1 Test and evaluate tools and applications according to organisational procedures 3.2 Test and fix errors and confirm website security according to organisational procedures 3.3 Determine whether use of social media tools is effective in developing web presence according to results 3.4 Review social media work and apply required changes according to organisational procedures 3.5 Confirm work performed with required personnel |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

| SKILL | DESCRIPTION |
|-----------------|---|
| Reading | <ul style="list-style-type: none"> Extracts required information from technical and organisational documents |
| Writing | <ul style="list-style-type: none"> Develops content in a manner that supports and conveys information, using required structures and specialised language |
| Self-management | <ul style="list-style-type: none"> Identifies and applies legal and ethical responsibilities regarding use of social media tools Makes routine decisions and implements standard procedures for routine tasks |
| Technology | <ul style="list-style-type: none"> Identifies and confirms purposes, specific functions and key features of basic digital systems and tools |

Unit Mapping Information

Supersedes and is not equivalent to ICTWEB201 Use social media tools for collaboration and engagement.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

Assessment Requirements for ICTWEB306 Develop web presence using social media

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with ICT Information and Communications Technology Training Package Version 6.0. |

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- develop social networking presence and upload and link at least three different file types using social media platforms, tools and applications.

In the course of the above, the candidate must:

- evaluate use of social media tools and application and action required changes
- confirm security of social media interactions according to cyber security procedures and protocols
- seek review from required personnel.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- basic technical terminology in relation to social networking, social media applications and tools
- basic methods of uploading images, text files, portable document format (PDF) files, audio files, video files and linking associated files
- features and functions of social media applications
- import and export software functions
- different types of social media tools and applications, benefits and issues associated with their use
- tagging process and facilitating collaborative folksonomy
- social media applications
- organisational procedures applicable to developing web presence through social media
- cyber security procedures and protocols.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- required hardware and its components
- online resources
- social media tools and applications that may be used to develop web presence through social media.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=a53af4e4-b400-484e-b778-71c9e9d6aff2>

MEM13001B Perform emergency first aid

Modification History

Not Applicable

Unit Descriptor

| | |
|------------------------|---|
| Unit descriptor | This unit covers performing basic emergency first aid, EAR (expired air resuscitation) and CPR (cardiopulmonary resuscitation). |
|------------------------|---|

Application of the Unit

| | |
|--------------------------------|---|
| Application of the unit | <p>This unit applies to administration of basic emergency first aid treatment and the management of life threatening situations where an unconscious person requires expired air resuscitation (EAR) and cardiopulmonary resuscitation (CPR).</p> <p>This unit does not meet all of the requirements expected of designated First Aid Officers.</p> <p>The competencies required for situations involving isolation of persons from hazardous electrical situations are covered in Unit MEM18049C (Disconnect/reconnect fixed wired equipment up to 1000 volts a.c. and 1500 volts d.c.) and Unit MEM10003B (Install and test electrical wiring and circuits up to 1000 volts a.c. and 1500 volts d.c.).</p> <p>Band: A</p> <p>Unit Weight: 1</p> |
|--------------------------------|---|

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

| Prerequisite units | | |
|--------------------|--|--|
| | | |
| | | |

Employability Skills Information

| Employability skills | This unit contains employability skills. |
|----------------------|--|
|----------------------|--|

Elements and Performance Criteria Pre-Content

| | |
|---|--|
| Elements describe the essential outcomes of a unit of competency. | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide. |
|---|--|

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--------------------------------|---|
| 1. Perform emergency first aid | <p>1.1. Correct procedures for EAR (expired air resuscitation) and CPR (cardiopulmonary resuscitation) are demonstrated on a mannequin.</p> <p>1.2. First aid treatment of injuries is carried out correctly.</p> <p>1.3. Details of first aid administered are accurately recorded.</p> <p>1.4. Understanding of relevant regulatory and legislative requirements is demonstrated.</p> |

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

Look for evidence that confirms skills in:

- planning and sequencing operations
- checking and clarifying task-related information
- performing EAR (expired air resuscitation) and CPR (cardiopulmonary resuscitation) on a mannequin
- simulated first aid treatment for the full range of injuries covered by the range statement
- reading, interpreting and following emergency first aid procedures and related documents
- entering information onto proformas and other relevant documents
- communicating effectively with injured persons, appropriate personnel and authorities

Required knowledge

Look for evidence that confirms knowledge of:

- applicable regulatory and legislative requirements
- use and application of any applicable personal protective equipment
- hazards and control measures associated with performing emergency first aid, including housekeeping
- instances where EAR and CPR should be performed
- procedures for preparing a person for the administration of EAR and CPR
- procedures for performing EAR and CPR on a child and an adult
- dangers and precautions to be taken when administering EAR and CPR
- emergency first aid procedures for injuries covered by the scope of this unit
- details to be recorded of first aid administered
- procedures and reasons for recording first aid administered
- relevant regulatory and legislative requirements with respect to emergency first aid
- the impact of regulatory/legislative requirements on the individual and others
- safe work practices and procedures

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment

A person who demonstrates competency in this unit must be able to perform emergency first aid.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Assessors must be satisfied that the candidate can competently and consistently perform all elements of the unit as specified by the criteria, including required knowledge, and be capable of applying the competency in new and different situations and contexts.

Context of and specific resources for assessment

This unit may be assessed on the job, off the job or a combination of both on and off the job. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by an individual working alone or as part of a team. The assessment environment should not disadvantage the candidate.

This unit could be assessed in conjunction with any other units addressing the safety, quality, communication, materials handling, recording and reporting associated with performing emergency first aid or other units requiring the exercise of the skills and knowledge covered by this unit.

Method of assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including direct observation, supervisor's reports, project work, samples and questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit of competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Guidance information for assessment

Range Statement

| RANGE STATEMENT | |
|--|--|
| <p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.</p> | |
| Injuries | Burns/scalds, fractures, cuts and abrasions, poisoning, foreign bodies in eyes, concussion and shock |

Unit Sector(s)

| | |
|--------------------|--|
| Unit sector | |
|--------------------|--|

Co-requisite units

| | | |
|---------------------------|--|--|
| Co-requisite units | | |
| | | |
| | | |

Competency field

| | |
|-------------------------|--------------------------------|
| Competency field | Occupational health and safety |
|-------------------------|--------------------------------|

MSMENV472 Implement and monitor environmentally sustainable work practices

Modification History

Release 1. Supersedes and is equivalent to MSAENV472B Implement and monitor environmentally sustainable work practices

Application

This unit of competency covers the skills and knowledge required to effectively analyse the workplace in relation to environmentally sustainable work practices, and to implement improvements and monitor their effectiveness.

This unit of competency applies to those who have responsibility for a specific area of work or who lead a work group or team. It addresses the knowledge, processes and techniques necessary to implement and monitor environmentally sustainable work practices, including the development of processes and tools.

It includes identifying areas for improvement, developing plans to make improvements, and implementing and monitoring improvements in environmental performance.

This unit of competency applies to all sectors of the manufacturing industry and members of its value chain. It may also be applied to all sections of an organisation, including office and warehouse. This unit will need to be appropriately contextualised as it is applied across an organisation and across different industry sectors.

This unit of competency applies to an individual working alone or as part of a team/work group and working in liaison with other shift team members and the control room operator, as appropriate.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

HSE

Unit Sector

Elements and Performance Criteria

Elements describe the essential outcomes

Performance criteria describe the performance needed to demonstrate achievement of the element

| | | | |
|---|--|-----|--|
| 1 | Investigate current practices in relation to resource usage | 1.1 | Identify environmental regulations applying to the enterprise |
| | | 1.2 | Assess procedures for assessing compliance with environmental regulations |
| | | 1.3 | Collect information on environmental and resource efficiency systems and procedures and provide to the work group, as required |
| | | 1.4 | Measure and record current resource usage by members of the work group |
| | | 1.5 | Analyse and record current purchasing strategies |
| | | 1.6 | Analyse current work processes to access information and data, and assist in identifying areas for improvement |
| 2 | Set targets for improvements | 2.1 | Seek input from stakeholders, key personnel and specialists |
| | | 2.2 | Access external sources of information and data as required |
| | | 2.3 | Evaluate alternative solutions to workplace environmental issues |
| | | 2.4 | Set efficiency targets |
| 3 | Implement performance | 3.1 | Source and use techniques/tools to assist in achieving targets |

| | | |
|-------------------------------|-----|--|
| improvement strategies | 3.2 | Apply continuous improvement strategies to own work area of responsibility, and communicate ideas and possible solutions to the work group and management |
| | 3.3 | Integrate environmental and resource efficiency improvement plans for own work group with other operational activities and implement them |
| | 3.4 | Seek suggestions and ideas about environmental and resource efficiency management from stakeholders and act upon them where appropriate |
| | 3.5 | Implement costing strategies to fully value environmental assets |
| 4 Monitor performance | 4.1 | Document outcomes and communicate reports on targets to key personnel and stakeholders |
| | 4.2 | Evaluate strategies and environmental performance, including breaches or potential breaches of regulations and occurrences outside of standard procedure which may lead to lower environmental performance |
| | 4.3 | Set new targets and investigate and apply new tools and strategies |
| | 4.4 | Promote successful strategies and reward participants where possible |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

This field allows for different work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included.

Regulatory framework

The latest version of all legislation, regulations, industry codes of practice and Australian/international standards, or the version specified by the local regulatory authority, must be used, and include one or more of the following:

- legislative requirements, including work health and safety (WHS)
- industry codes of practice and guidelines
- environmental regulations and guidelines
- Australian and other standards
- licence and certification requirements
- *ISO 14001:2015 Environmental management systems*

Procedures

All operations must be performed in accordance with relevant procedures.

Procedures are written, verbal, visual, computer-based or in some other form, and include one or more of the following:

- work instructions
- standard operating procedures (SOPs)
- safe work method statements (SWMS)
- formulas/recipes
- batch sheets
- temporary instructions
- any similar instructions provided for the smooth running of the plant

Unit Mapping Information

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=d1287d36-dff4-4e9f-ad2c-9d6270054027>

Assessment Requirements for MSMENV472 Implement and monitor environmentally sustainable work practices

Modification History

Release 1. Supersedes and is equivalent to MSAENV472B Implement and monitor environmentally sustainable work practices

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy the requirements of the elements and performance criteria and must include the ability to:

- investigate/analyse resource usage
- evaluate improvement alternatives and set targets
- implement improvements within the limit of own authority
- monitor the performance of improvements.

Knowledge Evidence

Evidence must be provided that demonstrates knowledge of:

- relevant environmental and resource efficiency issues, specific to industry practices, including:
 - contribution to climate change and other macro threats that can arise from materials and work processes used
 - regulated environmental issues
 - issues relevant to licencing conditions
- best practice environmental approaches relevant to own area of responsibility
- methods for measuring and calculating resource usage.

Assessment Conditions

- The unit should be assessed holistically and the judgement of competence based on a holistic assessment of the evidence.
- The collection of performance evidence:
 - should occur over a range of situations
 - will typically include a supervisor/third-party report focusing on consistent performance and problem recognition and solving. A supervisor/third-party report must be prepared by someone who has a direct, relevant, current relationship with the person being assessed and who is in a position to form a judgement on workplace performance relevant to the unit of competency
 - will typically include the use of appropriate tools, equipment and documents

- may use industry-based simulation for all or part of the unit particularly where safety, lack of opportunity or significant cost is an issue.
- Assessment should occur in operational workplace situations. Where this is not possible, or where personal safety or environmental damage are limiting factors, assessment must occur in a sufficiently rigorous simulated environment reflecting realistic operational workplace conditions. This must cover all aspects of workplace performance, including environment, task skills, task management skills, contingency management skills and job role environment skills.
- Assessment in a simulated environment should use evidence collected from one or more of:
 - walk-throughs
 - pilot plant operation
 - demonstration of skills
 - industry based case studies/scenarios
 - ‘what ifs’.
- Knowledge evidence may be collected concurrently with performance evidence (provided a record is kept) or through an independent process, such as workbooks, written assessments or interviews (provided a record is kept).
- Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.
- Conditions for assessment must include access to all tools, equipment, materials and documentation required, including relevant workplace procedures, product and manufacturing specifications associated with this unit.
- The regulatory framework will be reflected in workplace policies and procedures and is not required to be independently assessed.
- Foundation skills are integral to competent performance of the unit and should not be assessed separately.
- As a minimum, assessors must satisfy the Standards for Registered Training Organisations 2015 assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=d1287d36-dff4-4e9f-ad2c-9d6270054027>

MSS014013 Contribute to sustainability related audits

Modification History

Release 1. Updated unit code. Changes to performance criteria. Range of conditions removed. Assessment requirements amended. Equivalent outcome.

Application

This unit describes the skills and knowledge to contribute to sustainability related audits either as an audit team member or through specifically nominated research and investigations for the audit team. It includes understanding the context of the sustainability audit; concepts of resource usage and waste and how they can be expressed as carbon and carbon equivalents.

This unit applies to sustainability related audits of a part or whole organisation or its value chain. The audits may be conducted to assist in regulatory compliance or as part of a strategy to improve the sustainability of an organisation's operations.

This unit applies to team leaders, technicians or others who may be required to assist in such an audit as part of their work role. It does not cover the skills needed to lead sustainability related audits.

No licensing or certification requirements exist at the time of publication. Relevant legislation, industry standards and codes of practice within Australia must be applied.

Pre-requisite Unit

Nil

Competency Field

Sustainable operations

Unit Sector

Not applicable

Elements and Performance Criteria

Elements describe the essential outcomes.

Performance criteria describe the performance needed to demonstrate achievement of the element.

- | | |
|----------------------------------|--|
| 1 Identify scope of audit | 1.1 Identify target area of audit within the organisation or value chain |
|----------------------------------|--|

| | |
|--|--|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| | <p>1.2 Identify sustainability related activities to be audited</p> <p>1.3 Identify and confirm own role in audit</p> <p>1.4 Identify and confirm own timelines and reporting processes</p> |
| <p>2 Identify work areas, processes and equipment covered by own audit responsibility</p> | <p>2.1 Identify inputs to processes or area being audited</p> <p>2.2 Identify material changes or other relevant changes that occur in the work area</p> <p>2.3 Identify key items of equipment and their purpose and relevance to the audit</p> <p>2.4 Identify measurable outputs of work area and the extent that they are relevant to the audit</p> |
| <p>3 Undertake measurement tasks</p> | <p>3.1 Identify need for technical assistance from colleagues</p> <p>3.2 Measure specified inputs to process or work area</p> <p>3.3 Measure specified outputs for process or work area</p> <p>3.4 Calculate difference between input and output</p> <p>3.5 Calculate measurable sources of waste for process or work area</p> <p>3.6 Determine difference between measurable and theoretical waste for process or work area</p> <p>3.7 Compare results to external targets</p> <p>3.8 Communicate results to audit team</p> |
| <p>4 Assist in developing strategies for reducing the use</p> | <p>4.1 Rank equipment or processes by use of specified input and waste generation</p> <p>4.2 Calculate current minimum input use by unit of product</p> |

| | |
|---|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| of specified input | 4.3 Develop strategies to reduce input use for processes |
| | 4.4 Develop strategies to minimise waste for processes |
| | 4.5 Identify strategies that may have regulatory implications |
| 5 Prepare recommendations for consideration by audit team and stakeholders | 5.1 Consult with key stakeholders in area or processes subject to audit |
| | 5.2 Rank strategies by cost benefit ratio |
| | 5.3 Short-list strategies |
| | 5.4 Prepare recommendations for consideration by audit team and stakeholders |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

Release 1. Supersedes and is equivalent to MSS014006 Contribute to sustainability related audits.

Links

The MSS Sustainability Companion Volume implementation Guides are available from VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5b04f318-804f-4dc0-9463-c3fb9a3fe998>

Assessment Requirements for MSS014013 Contribute to sustainability related audits

Modification History

Release 1. Updated unit code. Changes to performance criteria. Range of conditions removed. Assessment requirements amended. Equivalent outcome.

Performance Evidence

There must be evidence the candidate has completed the tasks outlined in the elements and performance criteria of this unit, and:

- contributed to at least 1 sustainability related audit, including:
 - assisting in identifying improvement strategies
 - assisting in providing recommendations
 - consulting with stakeholders.

Knowledge Evidence

There must be evidence the candidate has knowledge of:

- sources of material and energy muda (waste)
- balancing techniques for process and process steps
- methods of measuring actual process amount and flows
- concepts of carbon and carbon equivalence as it applies to sustainability
- muda (waste) reduction strategies and methods along with costs, effectiveness and alternative strategies
- cost-benefit analysis
- legislation, regulation and protocols relevant to work area
- sustainability related process mapping
- process and changes which occur within the process
- environmental impacts of materials and energy used and emitted in both actual and carbon equivalents
- environmental sensitivities of all areas impacted by the work, process area and containment
- root cause analysis and problem solving
- sustainability issues relevant to the work and process area
- AS/NZS ISO 14000 Environmental Management Systems or its authorised replacement.

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions, contingencies, facilities, equipment and resources.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

The MSS Sustainability Companion Volume implementation Guides are available from VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5b04f318-804f-4dc0-9463-c3fb9a3fe998>

MSS015022 Develop strategies for more sustainable use of resources

Modification History

Release 1. Updated unit code. Range of conditions removed. Assessment requirements amended. Equivalent outcome.

Application

This unit describes the skills and knowledge to identify strategies for more sustainable uses of resources. The unit includes the identification of waste (muda) as part of a strategy for achieving better sustainability outcomes in a process as well as quantifying theoretical and actual resource (including energy) consumption.

This unit applies inside organisations and their value chains and specifically applies to the use of resources as part of an overall response to improving sustainability.

Where the carbon footprint (or water footprint or similar) of an organisation or value chain is known, the unit can be applied to developing strategies for the reduction of that footprint. A manager or technical specialist who has a major responsibility for sustainability as part of a broader work role would typically undertake this, or sustainability may be their primary work responsibility.

No licensing or certification requirements exist at the time of publication. Relevant legislation, industry standards and codes of practice within Australia must be applied.

Pre-requisite Unit

Nil

Competency Field

Sustainable operations

Unit Sector

Not applicable

Elements and Performance Criteria

Elements describe the essential outcomes.

Performance criteria describe the performance needed to demonstrate achievement of the element.

- | | | | |
|---|-----------------|-----|--|
| 1 | Quantify | 1.1 | Identify all significant resources used by process |
|---|-----------------|-----|--|

| | | | |
|---|---|---|---|
| Elements describe the essential outcomes. | | Performance criteria describe the performance needed to demonstrate achievement of the element. | |
| | resource consumption | 1.2 | Identify consumption measurements available for each resource |
| | | 1.3 | Quantify consumption for each resource |
| 2 | Quantify resource loss | 2.1 | Determine theoretical consumption of each resource |
| | | 2.2 | Compare theoretical consumption with actual consumption |
| | | 2.3 | Quantify loss (emission) for each resource |
| 3 | Recommend strategies for reducing muda (waste) | 3.1 | Short-list high emission process steps |
| | | 3.2 | Analyse process to identify emission steps or locations |
| | | 3.3 | Determine root cause of emission |
| | | 3.4 | Investigate methods for reducing emission |
| | | 3.5 | Develop strategies and recommendations for improvement |
| 4 | Prepare resources use audit report | 4.1 | Identify purpose of report and key stakeholders |
| | | 4.2 | Compile data, implications and recommendations |
| | | 4.3 | Consult with stakeholders |
| | | 4.4 | Write and present report |

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

Release 1. Supersedes and is equivalent to MSS015002 Develop strategies for more sustainable use of resources.

Links

The MSS Sustainability Companion Volume implementation Guides are available from VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5b04f318-804f-4dc0-9463-c3fb9a3fe998>

Assessment Requirements for MSS015022 Develop strategies for more sustainable use of resources

Modification History

Release 1. Updated unit code. Range of conditions removed. Assessment requirements amended. Equivalent outcome.

Performance Evidence

There must be evidence the candidate has completed the tasks outlined in the elements and performance criteria of this unit, and:

- quantified significant resource consumption and emission using materials balancing for at least 1 organisation or value chain, including developing strategies for reducing emissions and preparing and presenting a resources use audit report.

Knowledge Evidence

There must be evidence the candidate has knowledge of:

- the concept of muda (waste) and muda categories
- muda reduction methods and strategies
- methods and uses of material balancing
- methods and uses of energy balancing
- methods of comparing theoretical with actual resource consumption
- methods for mapping processes and resources consumed
- methods of measuring actual resource usage
- AS/NZS ISO 14001 Environmental Management Systems or its authorised replacement.

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions, contingencies, facilities, equipment and resources.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

The MSS Sustainability Companion Volume implementation Guides are available from VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5b04f318-804f-4dc0-9463-c3fb9a3fe998>

MSS015025 Develop a business case for sustainability improvements

Modification History

Release 1. Updated unit code. Changes to performance criteria. Range of conditions removed. Assessment requirements amended. Equivalent outcome.

Application

This unit describes the skills and knowledge to develop an appropriate business case for proposed changes which will deliver improvements to the sustainability of a process or organisation. It includes cost benefit and return on investment (ROI) analyses. The business case may be required for sustainability related improvements in response to regulatory, Board, employee, shareholder or community requests or pressure.

This unit applies inside organisations and their value chains.

This unit applies to a manager or technical specialist who has a major responsibility for sustainability as part of a broader work role or sustainability may be their primary work responsibility. The manager or technical specialist may undertake this alone or as part of a team.

No licensing or certification requirements exist at the time of publication. Relevant legislation, industry standards and codes of practice within Australia must be applied.

Pre-requisite Unit

Nil

Competency Field

Sustainable operations

Unit Sector

Not applicable

Elements and Performance Criteria

Elements describe the essential outcomes.

Performance criteria describe the performance needed to demonstrate achievement of the element.

1 **Define the**

1.1 Define the purpose of the project

| | |
|--|---|
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| intended sustainability improvement project | 1.2 Determine the project goals 1.3 Read and interpret regulatory requirements 1.4 Determine stakeholders for project 1.5 Clarify the critical success factors for the project 1.6 Quantify the current state |
| 2 Quantify expected benefits from the project | 2.1 Calculate cost of any capital improvements from the project 2.2 Determine production improvements 2.3 Determine maintenance improvements 2.4 Determine product life cycle improvements 2.5 Determine regulatory health, safety and environment (HSE) improvements 2.6 Estimate total benefit of proposed project |
| 3 Determine costs required to implement project | 3.1 Estimate fixed capital costs required 3.2 Estimate personnel costs required 3.3 Estimate financial costs required 3.4 Estimate time required for project and time-related costs 3.5 Estimate total costs of project |
| 4 Prepare a proposal justifying project | 4.1 Estimate return on investment (ROI), sustainability and other project benefits 4.2 Estimate costs of not proceeding with the project 4.3 Compare benefits to costs using financial modelling methods |

Elements describe the essential outcomes.

Performance criteria describe the performance needed to demonstrate achievement of the element.

4.4 Write proposal for project

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

Release 1. Supersedes and is equivalent to MSS015007 Develop a business case for sustainability improvements.

Links

The MSS Sustainability Companion Volume implementation Guides are available from VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5b04f318-804f-4dc0-9463-c3fb9a3fe998>

Assessment Requirements for MSS015025 Develop a business case for sustainability improvements

Modification History

Release 1. Updated unit code. Changes to performance criteria. Range of conditions removed. Assessment requirements amended. Equivalent outcome.

Performance Evidence

There must be evidence the candidate has completed the tasks outlined in the elements and performance criteria of this unit, and:

- developed at least 1 business case proposal for a sustainability improvement project for an organisation or process.

Knowledge Evidence

There must be evidence the candidate has knowledge of:

- characteristics of good project purposes, goals, critical success factors and key performance indicators
- regulatory environment and requirements for sustainability related project, including health, safety and environment (HSE) aspects
- concept of capital versus operational improvements
- internal and external data sources
- methods of quantifying project benefits across the life cycle
- project costing methods for capital, personnel, financial and time related costs
- financial modelling for business cases, including:
 - ROI calculations
 - cost-benefit analysis
- types of improvements, including:
 - capital improvements:
 - the purchase, installation, construction and commissioning of new equipment
 - alterations to existing equipment designed to improve the sustainability of the organisation's operations and which will be classed as capital in the organisation's balance sheet
 - production improvements
 - maintenance improvements
- accounting conventions and requirements and the alternative lean view and when it is appropriate
- AS/NZS ISO 14001 Environmental Management Systems or its authorised replacement.

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions, contingencies, facilities, equipment and resources.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

The MSS Sustainability Companion Volume implementation Guides are available from VETNet: -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5b04f318-804f-4dc0-9463-c3fb9a3fe998>

PSPETH002 Uphold and support the values and principles of public service

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPETHC401A Uphold and support the values and principles of public service.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to contribute to an ethical workplace and participate in ethical decision making.

This unit applies to those working in public sector roles but may be applied to anyone working in a similar organisational context.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would generally work independently and as part of a team, where they may have some supervisory responsibilities. They would perform complex tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Ethics

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Contribute to an ethical workplace | <p>1.1 Access, interpret and apply information on ethical values.</p> <p>1.2 Discuss and confirm application of ethical values and principle with senior management and colleagues to ensure common understanding and application.</p> <p>1.3 Assist others to access and use public sector ethics legislation and guidelines to ensure compliance with requirements.</p> <p>1.4 Explain the differences between ethics and personal beliefs to others to encourage understanding and compliance with the principles of procedural fairness.</p> <p>1.5 Identify and discuss with work colleagues hypothetical work practices that would constitute unethical conduct including strategies to avoid or deal with them.</p> |
| 2. Participate in ethical decision-making | <p>2.1 Identify real and potential ethical problems, and the decision-making processes used to resolve or refer them.</p> <p>2.2 Monitor and access information to ensure currency in ethical knowledge.</p> <p>2.3 Develop judgment through involvement in workplace discussions or ongoing professional development related to ethical standards and practices.</p> <p>2.4 Support staff to contribute to ethical discussions and problem-solving.</p> <p>2.5 Use processes for preventing and reporting unethical conduct and assist others in their application.</p> |

Foundation Skills

The foundation skills demands of this unit have been mapped for alignment with the Australian Core Skills Framework (ACSF). The following tables outline the performance levels indicated for successful attainment of the unit.

Further information on ACSF and the foundation skills underpinning this unit can be found in the Foundation Skills Guide on the GSA website.

Unit Mapping Information

This unit supersedes and is equivalent to PSPETHC401A Uphold and support the values and principles of public service.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPETH002 Uphold and support the values and principles of public service

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. The candidate must demonstrate evidence of performance of the following on at least one occasion:

- accessing legislation and codes of ethics electronically or in hard copy
- applying objective and impartial evaluation of ethical problems
- preparing written reports that contain information that is impartial, substantiated, accurate and complete
- adjusting communication methods to suit different audiences

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- the nature of public sector ethics and ethical values as opposed to personal beliefs/value systems
- fundamental ethical principles including at least one of:
 - natural justice
 - procedural fairness
 - respect for persons
 - responsible care
- equal employment opportunity, equity and diversity principles
- procedures and protocols for reporting unethical conduct

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPETH003 Promote the values and ethos of public service

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPETHC501B Promote the values and ethos of public service.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to promote ethical standards to assist staff in avoiding conflicts of interest and to model and foster integrity.

This unit applies to those working in public sector roles but may be applied to anyone working in a similar organisational context.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently, as part of a team and with supervisory responsibilities. They would perform complex tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Ethics

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Promote ethical standards | <p>1.1 Discuss interpretation of ethical standards with senior staff to ensure common understanding of requirements.</p> <p>1.2 Explain to others the ethical obligations of public service and the consequences of unethical conduct.</p> <p>1.3 Assess conduct of self and others against ethics standards, legislation and guidelines, and provide feedback.</p> <p>1.4 Use the resolution and/or referral of ethical problems identified in dealings with staff and public as learning opportunities.</p> |
| 2. Assist staff to avoid conflicts of interest | <p>2.1 Explain conflict of interest requirements to staff using situations they are likely to experience.</p> <p>2.2 Discuss with staff matters involving competing interests or conflicting views and resolve or refer as required.</p> |
| 3. Model and foster integrity or conduct | <p>3.1 Give ethical, lawful and reasonable directions to staff, using personal work practices, to provide a consistent example of desired ethical conduct, and develop team values through collaboration and leadership.</p> <p>3.2 Provide protection from reprisals for refusing others' directions to act unethically.</p> <p>3.3 Model and explain to others the principles of procedural fairness.</p> <p>3.4 Explain, promote and use decision making which upholds ethical standards.</p> <p>3.5 Assess the risk of unethical conduct and recommend changes to policies or practices to improve outcomes.</p> <p>3.6 Encourage the reporting of suspected unethical conduct.</p> |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit. ACSF mapping was not completed due to VET reform timelines, it has been noted for continuous improvement.

Unit Mapping Information

This unit supersedes and is equivalent to PSPETHC501B Promote the values and ethos of public service.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPETH003 Promote the values and ethos of public service

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- applying ethical decision making/problem solving
- using a variety of words and language structures to explain complex ideas to different audiences
- interpreting and explaining complex, formal documents and assisting others to apply them in the workplace
- using strategies to clarify understanding
- preparing written advice and reports requiring accuracy of expression
- accessing legislation and codes of ethics electronically or in hard copy
- assisting others to apply occupational health and safety and environmental procedures relating to ethical work practices

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- organisational code of ethics/conduct
- legislation related to privacy, freedom of information, human rights, whistleblower protection and procedural fairness
- procedures for declaring conflicts of interest
- procedures or protocols for reporting unethical conduct
- work health and safety procedures relating to ethical work practices

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPGEN028 Provide a quotation

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPGOV407B Provide a quotation.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with the new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to conduct a cost-benefit analysis and the preparation of written or oral quotations to provide goods or services to others. It includes clarifying requirements, establishing costs and availability of resources, preparing estimates, preparing and submitting quotations and taking follow up action.

This unit applies to those working in generalist or specialist roles within the public sector.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently, performing complex tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

General

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Clarify requirements | 1.1 Confirm requirements with the funder and/or purchaser. 1.2 Conduct market research to confirm the viability of providing a quotation. |
| 2. Establish costs and availability of resources | 2.1 Obtain costs for labour, equipment or materials and include in the quotation in full. 2.2 Confirm availability of equipment, materials or personnel for the timeframe required. 2.3 Include infrastructure costs to the organisation of providing the goods or services. 2.4 Include cost or benefit from any asset disposal at the conclusion of the contract. |
| 3. Prepare estimate | 3.1 Prepare estimate to take account of all requirements and allow for contingencies. 3.2 Structure estimate to provide for cost recovery or to return a profit. 3.3 Estimate costs to enable provision of goods or services to the standards required by the client. 3.4 Check estimate for accuracy. |
| 4. Prepare and submit quotation | 4.1 Include required details to meet client requirements. 4.2 Submit quotation within required timeframe. |
| 5. Take follow up action | 5.1 Negotiate changes and variations to the quotation to meet the needs of the client and the organisation. 5.2 Evaluate proposal, outcome and preparation process based on feedback from a range of stakeholders and use results to improve subsequent quotations. |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV407B Provide a quotation.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPGEN028 Provide a quotation

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- using numeracy for selecting and applying mathematical concepts, estimating, checking reasonableness of results
- using mathematical language to communicate mathematical information
- managing financial and other resources
- using literacy for oral clarification of issues and negotiating variations and changes with clients
- using required language and style for written quotations
- using technical and other vocabulary
- applying research and analysis methods
- using problem solving including conceptual/reasoning skills
- networking with clients, suppliers and stakeholders

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- public sector legislation including WHS and environment, guidelines, policies and practices relating to providing quotations for services
- organisational tendering guidelines, policies and practices
- financial accountability requirements
- legal requirements of selling government services
- implications of contracting agreements where government is the provider

- whole-of-life considerations
- disposals considerations including legal aspects of disposals
- approval processes
- tendering management processes

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPGEN043 Apply government processes

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPGOV422A Apply government processes.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with the new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to apply government processes. It includes applying information relating to the machinery of government and knowledge of organisations protocols and functions.

This unit applies to those working in generalist and specialist roles within the public sector.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently performing complex tasks in a range of familiar and unfamiliar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

General

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Apply information relating to the machinery of Government | <p>1.1 Identify, access and apply up-to-date information relating to machinery of Government relevant to work responsibilities.</p> <p>1.2 Identify ambiguity in the structure and function of the organisation or work area as a result of past, present or future changes and seek and implement advice on required work priorities and outcomes for the transition period.</p> <p>1.3 Manage role ambiguity as a result of past, present or future changes.</p> |
| 2. Apply knowledge of organisational functions | <p>2.1 Access and apply up-to-date information relating to the structure and functions of the organisation.</p> <p>2.2 Identify appropriate persons to ensure correct levels of authority are utilised to deal with responsibilities within the organisation.</p> <p>2.3 Identify areas of work where delegations apply and confirm delegation levels within the organisation.</p> <p>2.4 Obtain approvals in the workplace in accordance with organisational delegations.</p> |
| 3. Apply knowledge of protocols | <p>3.1 Identify, access and apply up-to-date information relating to government protocols.</p> <p>3.2 Observe protocols in dealings with other organisations and with persons from within and outside the organisation.</p> <p>3.3 Adhere to written protocols, formats and standards in writing government documents.</p> |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV422A Apply government processes.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPGEN043 Apply government processes

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- locating and accessing information
- acquiring, retaining and recalling information
- applying information and protocols
- discarding redundant information
- dealing with ambiguity and machinery of Government changes
- communicating with a diverse workforce

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Westminster System
- separation of powers
- systems of government
- Parliamentary structures (bicameral/unicameral)
- role and function of Parliament
- role and structures of Parliamentary committees
- application of statutory requirements imposed by central agencies, including Treasury, Premiers, Prime Minister and Cabinet
- Parliamentary procedures impacting on the organisation (including petitions, Ministerial statements, Question Time, Questions without Notice, Questions on Notice)

- Parliamentary process and how it affects operational objectives and timeframes
- Cabinet processes
- Bill to Act process
- Machinery of Government and administrative arrangements
- range and type of legislation relating to the public sector including occupational health and safety
- public sector code/s of ethics, code/s of conduct and statements of values

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPGEN049 Undertake negotiations

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPGOV507A Undertake negotiations.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with the new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to undertake negotiations. It includes planning and finalising negotiation outcomes.

This unit applies to those working in generalist and specialist roles within the public sector.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently performing complex tasks in a range of familiar and unfamiliar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

General

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Plan for negotiation | <p>1.1 Clarify the purpose of the negotiation and the issue/s under consideration with affected personnel and through analysis of all related information.</p> <p>1.2 Identify primary needs and desired outcomes of all parties.</p> <p>1.3 Determine the organisation's position in consultation with senior personnel, and devise a negotiation approach based on an analysis of the strengths and weaknesses of the position.</p> <p>1.4 Collect, analyse and organise information relating to the negotiation, including any precedents.</p> <p>1.5 Agree upon timeframe and logistics, develop a negotiation plan and communicate to other staff, if any, involved in the negotiation team.</p> |
| 2. Conduct negotiation | <p>2.1 Agree upon the issue/s under consideration and the negotiation process to be used with all parties and document.</p> <p>2.2 Use negotiation techniques to persuade the other party of the strength of the argument in favour of the organisation's position.</p> <p>2.3 Modify the negotiation plan if necessary to respond to contingencies.</p> <p>2.4 Select and use techniques for dealing with conflict or deadlocks in accordance with the negotiation plan and the progress of the negotiation.</p> <p>2.5 Discuss options for resolving the issue and determine the acceptability of these to the parties.</p> |
| 3. Finalise negotiation outcomes | <p>3.1 Reach an agreed conclusion, document and obtain sign-off by the parties.</p> <p>3.2 Report negotiation outcomes and debrief stakeholders if required.</p> <p>3.3 Determine any further action required as a result of agreement and action.</p> <p>3.4 Review the negotiation process and outcomes, and document lessons learnt for future use.</p> |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPGOV507A Undertake negotiations.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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Assessment Requirements for PSPGEN049 Undertake negotiations

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- applying legislation, regulations and policies relating to negotiating in the public sector
- communicating with diverse stakeholders including the other party, team members and senior management
- communicating by listening, questioning, establishing rapport and responding
- applying decision making and problem-solving
- adjusting quickly to new information or unexpected questions and attitudes

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- legislation, regulations, policies, procedures and guidelines relating to negotiations in the public sector
- sources of organisational information
- delegations and lines of authority
- decision making
- negotiation techniques
- conflict resolution
- recordkeeping requirements for negotiations

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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PSPMGT006 Develop a business case

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPMNGT607B Develop a business case.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to perform market analysis, development and cost options, and justify for a recommended business solution.

This unit applies to those developing appropriate and cost-effective business solutions.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously, performing complex tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Management

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Research a business case | 1.1 Identify and confirm business problem. 1.2 Analyse key stakeholder requirements to clarify objectives. 1.3 Consider a range of factors to identify opportunities and constraints. 1.4 Conduct market analysis. |
| 2. Examine business solutions | 2.1 Analyse and document business and technical impacts and risks. 2.2 Analyse community, environmental and human resource impacts. 2.3 Canvas for alternative solutions and their financial implications and discuss with senior management and business case originator. |
| 3. Construct a business case | 3.1 Develop options and determine and document impacts, risks, costs and stakeholders. 3.2 Make and justify recommendations. |
| 4. Finalise a business case | 4.1 Present business case and explain recommendations. 4.2 Obtain approvals and management endorsement. |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPMNGT607B Develop a business case.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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Assessment Requirements for PSPMG T006 Develop a business case

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- managing resources
- using language and style suited to written submissions
- explaining complex ideas to different audiences
- interpreting and explaining complex, formal documents
- preparing written advice and reports requiring reasoning and precision of expression
- engaging in discussion using exchange of complex oral information

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- government and organisational goals, policies and practices
- legal requirements related to the business activity
- financial and accounting issues relating to developing a business case
- whole-of-life considerations
- approval processes
- aspects of trade practices law, commercial law and law of contract relating to the development of business cases
- jurisdictional legislation that applies to business case development, including work health and safety and environmental requirements

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
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PSPMGT012 Facilitate knowledge management

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPMNGT614A Facilitate knowledge management.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to manage knowledge and information in the business unit to improve productivity and organisational efficiency, promote innovation and meet business unit goals. It includes establishing the organisational context for knowledge management, developing capability, facilitating knowledge management, and integrating aspects of knowledge management with records management.

This unit applies to those working to facilitate knowledge management within their organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously, performing complex tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Management

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Establish the organisational context for knowledge management | <p>1.1 Identify the organisation's history, culture, functions, strategic direction, performance and knowledge resources.</p> <p>1.2 Identify organisational strategies and goals that may be assisted by the development of organisational capability in knowledge management.</p> <p>1.3 Assess the current knowledge management position of the organisation and determine the strengths and weaknesses of its knowledge resources and activities.</p> <p>1.4 Undertake consultation with stakeholders to raise and awareness of knowledge management and to establish goals for the business unit and/or the organisation.</p> <p>1.5 Identify and explore the cultural aspects of knowledge and knowledge management in the context of the organisational environment.</p> |
| 2. Develop capability in knowledge management | <p>2.1 Identify and promote the benefits of knowledge management.</p> <p>2.2 Develop and align knowledge management initiatives with the overall organisational strategy.</p> <p>2.3 Develop initiatives to build long-term capability in knowledge management and a culture of sharing knowledge and to create new knowledge in the organisation.</p> <p>2.4 Build management and stakeholder support throughout knowledge management initiatives to ensure immediate successes are transformed into ongoing benefits.</p> |
| 3. Facilitate knowledge management | <p>3.1 Facilitate methods for creating, discovering and acquiring knowledge in the business unit.</p> <p>3.2 Promote methods and systems for capturing and storing knowledge.</p> <p>3.3 Promote methods and systems for presenting, distributing and sharing knowledge.</p> <p>3.4 Facilitate activities for revising and disposing of knowledge.</p> |
| 4. Integrate aspects of | <p>4.1 Integrate processes for the management of explicit knowledge with the organisation's information management systems.</p> |

| | |
|---|--|
| knowledge management with information management | 4.2 Record and store explicit knowledge. 4.3 Facilitate structuring, maintaining and linking of explicit knowledge to related organisational information. 4.4 Manage knowledge and information to improve their integration and use to meet business unit goals. |
|---|--|

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPMNGT614A Facilitate knowledge management.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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Assessment Requirements for PSPMG T012 Facilitate knowledge management

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- applying legislation, regulations and policies relating to knowledge management and information management
- showing leadership and taking risks in the context of knowledge management
- facilitating groups and learning
- communicating with a diverse range of stakeholders to build knowledge management capacity

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- public sector legislation including work health and safety and environment, regulations, policies, procedures and guidelines relating to knowledge management and information management, including privacy, freedom of information
- principles of knowledge management
- Australian Standard for Knowledge management
- tools and techniques related to introduction of knowledge management initiatives
- intersection of knowledge management with other disciplines, including organisational learning, information management/technology, human resources management, communications
- cultural aspects of knowledge and knowledge management

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
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PSPPCM006 Select providers and develop contracts

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC413A Select providers and develop contracts.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to select preferred providers as a result of a formal request for offer process. It includes evaluating offers, obtaining approvals, developing and formalising contractual arrangements, and debriefing the market and other stakeholders.

This unit applies to those working as public sector staff required to select providers.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work under supervision, while performing complex tasks in familiar context.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Select preferred providers | 1.1 Form and coordinate evaluation panel. 1.2 Evaluate offers according to evaluation plan and organisational probity requirements which relate to managing conflicts of interest and adherence to public sector standards. 1.3 Obtain specialist expertise where necessary to assist with evaluation of offers. 1.4 Undertake clarification and negotiation of matters contained in offers with bidders. 1.5 Select preferred providers and develop, justify and document recommendations for allocation of business against selection criteria. 1.6 Obtain approvals for the recommended offers. 1.7 Notify successful providers. |
| 2. Develop and formalise contractual arrangements | 2.1 Obtain approvals to enter negotiations and negotiate final wording of contract. 2.2 Obtain approvals to enter into contracts and ensure contracts are signed by all parties before contracted work commences. 2.3 Structure contracts to capture and address identified risks, protect both parties, provide the basis for due performance, and outline expected standards of behaviour. 2.4 Ensure contracts are valid and legally binding to the parties. |
| 3. Debrief market and other stakeholders | 3.1 Provide advice on the contractual arrangements to internal stakeholders. 3.2 Inform unsuccessful bidders and provide constructive feedback on their proposals. 3.3 Make details of successful providers public. |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC413A Select providers and develop contracts.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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Assessment Requirements for PSPPCM006 Select providers and develop contracts

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with contractors and stakeholders, involving complex oral and written exchanges of information
- networking within probity boundaries with diverse stakeholders and contractors
- applying probity requirements in evaluating offers, formalising contracts and debriefing stakeholders
- planning and organising skills to analyse and compare written information to ensure key elements from the specification and the procurement plan are captured in the written contract
- learning skills to keep up-to-date with relevant procurement legislation, policies and procedures

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to award of contracts, including environmental purchasing and corporate social responsibility guidance
- organisational procurement policies, practices and approval processes
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to receipt and selection of offers

- aspects of law of contract, laws of tort, trade practices law, commercial law and other legislation relating to receipt and evaluation of offers, negotiation and award of contracts
- equal employment opportunity

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
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PSPPCM007 Manage contracts

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC414A Manage contracts.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to manage contracts. It includes undertaking preparations, establishing and maintaining contract management arrangements, monitoring and maintaining contract performance, and completing and reviewing contracts.

This unit applies to those working as public sector employees with responsibilities relating to contract management.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously with management responsibilities while performing complex tasks in familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Prepare to manage a contract | 1.1 Confirm and clarify contract requirements, approvals and funding arrangements and identify obligations and limits of authority. 1.2 Clarify and assist with contract administration issues by contacting specialists and stakeholders and confirm operational elements of the contract. 1.3 Identify and clarify key contract clauses. 1.4 Identify and confirm process, timings, and key performance indicators with stakeholders. 1.5 Develop or review the risk management plan. 1.6 Develop or obtain contract management strategy and enter key details from the contract. 1.7 Form contract management team and allocate roles and responsibilities. |
| 2. Implement a contract management strategy | 2.1 Confirm and implement start-up or transition arrangements. 2.2 Establish information and contractor and stakeholder communication strategies. 2.3 Monitor and update risk management plan. 2.4 Manage relationship with contractors and stakeholders. 2.5 Obtain specialist expertise as necessary for progress meetings and for advice on or resolution of contract issues. 2.6 Maintain contract information and documentation. |
| 3. Monitor and maintain performance of a contract | 3.1 Ensure obligations to contractor and stakeholders are met. 3.2 Use monitoring and control measures and performance indicators to manage performance of contract and ensure that all obligations under the agreement are being met. 3.3 Manage contract variations. 3.4 Investigate and resolve or refer disputes and complaints. 3.5 Manage negotiation of contract issues. 3.6 Maintain communication with all stakeholders on the performance of the contract. |
| 4. Complete and review contract | 4.1 Confirm client satisfaction with contract deliverables. 4.2 Finalise, amend, cancel or terminate contracts. 4.3 Manage close-out, and renewal of contract or transition to a new contract. 4.4 Review contract management, contractor performance, user |

| | |
|--|--|
| | <p>satisfaction and audit results.</p> <p>4.5 Document and explain variances to measures or outcomes that are not met in full.</p> <p>4.6 Report on contractor performance and review contract management practice and make recommendations for improvement.</p> |
|--|--|

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC414A Manage contracts.

Links

Companion Volume implementation guides are found in VETNet -
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Assessment Requirements for PSPPCM007 Manage contracts

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with contractors and stakeholders, involving complex oral and written exchanges of information
- networking, within probity boundaries, with diverse stakeholders and contractors
- interpreting complex documents, including contracts, legislation and guidelines
- applying simple supply chain and supplier issues management techniques

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing and corporate social responsibility guidance
- contract performance management
- privacy and confidentiality issues
- probity principles and issues
- financial and accounting issues relevant to the contract

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
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PSPPCM008 Manage contract performance

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC503B Manage contract performance.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to implement strategies that ensure effective contract performance. It includes managing the business relationship, performance of the contract, and contract issues; and implementing a communication strategy.

This unit applies to those working in roles involved in procurement contract maintenance.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently seeking advice as required, performing complex tasks in a range of familiar and unfamiliar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Manage the business relationship | 1.1 Manage probity. 1.2 Meet obligations to the contractor. 1.3 Record consideration of conflicts of interest and their resolution. 1.4 Manage business relationship with contractor in the public interest through formal and informal mechanisms. |
| 2. Manage performance of the contract | 2.1 Implement start-up or transition arrangements. 2.2 Monitor and update contract management plan for effectiveness regularly. 2.3 Monitor performance of contract against key performance indicators and track milestones to ensure obligations under the agreement are being met. 2.4 Manage e-procurement, financial and other resources. 2.5 Identify and manage emerging and potential risks. |
| 3. Manage contract issues | 3.1 Manage contract variations. 3.2 Identify early signs of under-performance, and take action to improve performance. 3.3 Investigate and resolve or refer disputes and complaints. 3.4 Conduct negotiation of contract issues. 3.5 Address and resolve or refer conflict. 3.6 Deal with non-compliance with codes of conduct, codes of practice and standards of behaviour. |
| 4. Implement communication and information strategy | 4.1 Maintain communication on the performance of the contract with all stakeholders. 4.2 Carry out management reporting. 4.3 Maintain contract information for organisational purposes. |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC503B Manage contract performance.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCM008 Manage contract performance

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking with contractors and stakeholders
- reading and applying complex documents, including contracts, legislation and guidelines
- writing management reports and keeping records of meetings, liaison, notes and follow-up actions
- building effective working relationships with contractors and stakeholders
- modelling effective team management approaches
- referring issues to the correct person
- resolving disputes, conflict and complaints
- making judgements about when to refer disputes, conflict and complaints to others
- applying understanding of supplier issues/supply chain management in the context of contract management
- managing contract documentation
- planning and organising contract meetings, reports and reviews
- maintaining currency of best practice examples in procurement practice and relevant procurement legislation, policies and procedures
- use electronic procurement templates

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing and corporate social responsibility guidance
- organisational procurement policies, practices and approval processes
- contract management for diverse contractual situations
- privacy and confidentiality issues
- codes of conduct, codes of practice and standards of individual behaviour relating to management of contracts and relationships with contractors
- financial and accounting issues relevant to the contract
- legal aspects of negotiation
- aspects of law of contracts, trade practices law and commercial law relevant to the management of contracts relating to complex procurement

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPPCM009 Finalise contracts

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC504B Finalise contracts.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to finalise processes for contracts. It includes completing contracts and implementing a contract review strategy.

This unit applies to those working as public sector staff with responsibility for finalising contracts.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to

Those undertaking this unit would work autonomously while performing complex tasks, in familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Complete contracts | <p>1.1 Review contracts due to expire to determine future requirements, and canvass options meeting requirements.</p> <p>1.2 Implement strategies to manage closure, renewal of contracts, or transition to a new contract.</p> <p>1.3 Finalise, amend, cancel or terminate contracts according to arrangements.</p> <p>1.4 Consult with contractor, and report completion, addressing contractor and contract manager performance.</p> |
| 2. Implement contract review strategy | <p>2.1 Determine timing of contract review to ensure a smooth transition to post contract arrangements.</p> <p>2.2 Review and monitor contract including contract management, contractor performance, user satisfaction and audit results.</p> <p>2.3 Document variances where measures or outcomes are not met in full.</p> <p>2.4 Prepare review report documenting outcomes against plans, final costs, user satisfaction, lessons learnt and any shortcomings in contract planning, management policies and procedures.</p> <p>2.5 Suggest recommendations for improvement and support them with evidence.</p> |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC504B Finalise contracts.

Links

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCM009 Finalise contracts

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with contractors and stakeholders, involving complex oral and written exchanges of information
- writing closure reports
- finalising outstanding issues so the contract can be closed
- identifying improvements to the contract management process
- managing contract closure documentation
- planning and organising contract closure meetings, reports and reviews

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract finalisation and review, including environmental purchasing and corporate social responsibility guidance
- privacy and confidentiality issues, including the requirement to appropriately classify information to ensure transparency as well as to treat bids as commercial-in-confidence
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to finalising contracts
- record keeping for official or historical records
- financial and accounting issues relevant to the contract

- aspects of contract law, trade practices law and commercial law relevant to the finalisation of contracts relating to complex procurement

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPPCM010 Manage procurement risk

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC505A Manage procurement risk.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to manage risks associated with all stages of procurement. It includes assessing risk, and preparing, implementing and reviewing a risk management plan.

This unit applies to those working as public sector staff in roles that involve managing procurement risks.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks, in familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Assess risk | 1.1 Identify legislation, policies, business processes and resources impacting the contract. 1.2 Identify procurement outcomes and internal inputs required. 1.3 Identify and confirm critical success factors required. 1.4 Identify non trivial procurement risks. 1.5 Identify potential probity risks. 1.6 Analyse causes of risk and their potential impact. 1.7 Determine likelihood and consequences of risks and develop risk assessments. |
| 2. Prepare risk management plan | 2.1 Develop preliminary risk management plan to address risks identified in planning phase. 2.2 Identify acceptable risks and those requiring treatment. 2.3 Design treatments to reduce risks to an acceptable level. 2.4 Develop plans for implementing new treatments, additional risk controls or modifications to existing controls. 2.5 Monitor risk level at key points during procurement process and, review and adjust risk management plan to cover procurement activity risks not already identified. |
| 3. Implement and review risk management plan | 3.1 Implement risk controls and treatments according to the treatment plan. 3.2 Implement risk management plan, monitor and revise to include potential or emerging risks during the life of the procurement activity. 3.3 Improve risk treatments and controls using review results. |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCM010 Manage procurement risk

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- writing risk management plans using templates or a recognised risk management methodology
- interpreting complex, formal documents
- making verbal and written recommendations about the management of procurement and contracting risks
- analysing risks associated with procurement and contract
- managing and updating the risk management plan
- learning skills to keep up-to-date with relevant procurement legislation, policies and procedures

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract risk management
- organisational procurement policies, practices and approval processes
- risk management procedures
- probity principles and issues, particularly as they relate to probity risks
- codes of conduct, codes of practice and standards of individual behaviour relating to the procurement process

- risks associated with financial and accounting issues relevant to procurement and contract management
- supplier issues and supply chain management in the context of procurement risk management
- aspects of law of contracts, trade practices law and commercial law relevant to risk management relating to complex procurement
- equal employment opportunity relevant to procurement and contract management
- environmental, sustainability and corporate social responsibility principles relevant to procurement and contract management

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPPCM011 Plan to manage a contract

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC506A Plan to manage a contract.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to establish arrangements for contract management. It includes confirming contract requirements, preparing a contract management plan, developing stakeholder relationships and implementing contract strategies and contractual arrangements.

This unit applies to those working in roles involving procurement contract management.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously while performing complex tasks, in familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Confirm contract requirements | <p>1.1 Identify legislation, public sector standards and organisational requirements relating to probity, financial management, approvals and other considerations for inclusion in the contract management plan.</p> <p>1.2 Re-confirm contract requirements with all parties.</p> <p>1.3 Determine obligations to the contractor, limits of authority and delegations according to contractual arrangements.</p> <p>1.4 Confirm start-up or transition arrangements.</p> |
| 2. Prepare contract management plan | <p>2.1 Identify contract risks and develop a risk management plan.</p> <p>2.2 Determine procedures to identify, receive and address contract variations.</p> <p>2.3 Determine procedures to investigate, resolve or refer disputes or complaints.</p> <p>2.4 Develop and negotiate key performance indicators and identify and approve administrative processes for the life of the contract.</p> <p>2.5 Document, obtain approval on and maintain a contract management plan that addresses key elements.</p> <p>2.6 Apply expected standards of behaviour, probity and privacy principles to all elements of contract management plan.</p> <p>2.7 Apply environmental, sustainability and corporate social responsibility principles to all elements of contract management plan.</p> |
| 3. Develop stakeholder relationships | <p>3.1 Identify stakeholder networks and relationships.</p> <p>3.2 Use networking strategies to establish, develop and maintain working relationships to promote benefits to the contract requirements.</p> <p>3.3 Develop and maintain confidence of stakeholders through high standards of behaviour and ethical conduct.</p> <p>3.4 Use negotiation strategies to achieve positive outcomes when difficult situations arise.</p> <p>3.5 Identify and confirm communication requirements in line with contractual obligations and stakeholder needs.</p> |
| 4. Implement contract strategies | <p>4.1 Identify requirements of confidentiality and freedom of information for the contract.</p> <p>4.2 Develop communication and/or information strategy that matches needs of the organisation, the contract and the contractor's</p> |

| | |
|--|---|
| | business environment. 4.3 Establish contract review requirements with stakeholders. 4.4 Develop contract review strategy to review management of the contract, contractor performance and user satisfaction. |
| 5. Implement contractual arrangements | 5.1 Establish and manage business relationship with contractor. 5.2 Implement start-up or transition arrangements. 5.3 Establish financial, administrative and information management processes. 5.4 Implement contractual arrangements according to contract management plan. 5.5 Maintain appropriate records for the life of the contract. |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC506A Plan to manage a contract.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCM011 Plan to manage a contract

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking, consulting and negotiating with contractors and stakeholders
- developing a written contract management plan and sub-plans
- reading and applying complex documents, including contracts, legislation and guidelines
- provide feedback
- modelling effective team management approaches
- referring issues to the correct person
- applying understanding of supplier issues and supply chain management in the context of procurement risk management
- planning and organising skills to manage and update the contract management plan and sub-plans
- maintaining currency of best practice examples in procurement practice and relevant procurement legislation, policies and procedures
- use electronic procurement templates

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing, sustainability and corporate social responsibility guidance relevant to the contract
- organisational procurement policies, practices and approval processes

- contract management planning for diverse contractual situations
- privacy and confidentiality issues
- codes of conduct, codes of practice and standards of individual behaviour relating to management of contracts and relationships with contractors
- financial and accounting issues relevant to the contract

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPPCM012 Plan for procurement outcomes

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC507A Plan for procurement outcomes.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to apply advanced planning to complex procurement within established guidelines, policies and procedures.

This unit applies to those working in roles involving procurement planning.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work would work autonomously while performing complex tasks, in familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Establish, apply and manage procurement governance arrangements | 1.1 Make contributions to forward procurement planning. 1.2 Apply organisational, financial and budgetary framework effectively to procurement. 1.3 Research and apply organisational objectives, policies and goals. 1.4 Identify and apply relevant interacting legislative, policy and probity requirements to the proposed procurement activity. 1.5 Develop and/or assess procurement needs, aligned to organisational objectives, business plan and appropriate justification of estimated procurement expenditure. 1.6 Propose alternatives to procurement action where appropriate. 1.7 Apply and manage probity principles when planning procurement activities. |
| 2. Identify, consult with and manage procurement stakeholders | 2.1 Identify internal and external stakeholders for procurement activities. 2.2 Develop strategies to effectively gather information from and distribute information to procurement stakeholders throughout the procurement process. 2.3 Inform and educate stakeholders on the concept of value for money. 2.4 Develop strategies for the ongoing consideration and management of key stakeholders. |
| 3. Conduct market research and develop appropriate strategies to approach the market | 3.1 Conduct market research and analysis. 3.2 Identify strengths and weaknesses of the market. 3.3 Determine appropriate procurement options and procurement methods for approaching the market, taking into account relevant jurisdictional and organisational policy requirements. |
| 4. Identify, source and manage resources to conduct procurement processes | 4.1 Identify, seek and manage financial and budgetary resources required to effectively conduct procurement processes. 4.2 Identify, seek and manage technical and procurement expertise required to effectively conduct procurement processes, including the establishment of tender evaluation panel or working group. 4.3 Determine and apply appropriate structures and processes to the conduct of the procurement, including operation of the tender evaluation panel or working group. |

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| | 4.4 Plan and communicate appropriate lead times for conducting procurement processes to stakeholders. |
| 5. Define procurement specifications and requirements | <p>5.1 Align procurement requirements with organisational objectives and business plans that are realistic in terms of the capacity of the market to supply.</p> <p>5.2 Develop and/or critically assess statements of requirements and specifications that meet business needs of the organisation.</p> <p>5.3 Review previous procurements and consult stakeholders to inform and define the specifications.</p> <p>5.4 Explore the viability of specifications to ensure risks and whole-of-life costs and benefits are identified and to support value for money.</p> |
| 6. Undertake detailed procurement planning | <p>6.1 Assist stakeholders to make meaningful contributions to procurement plans.</p> <p>6.2 Conduct procurement risk assessments and determine appropriate risk management strategies.</p> <p>6.3 Address jurisdictional, organisational, legislative, policy and probity requirements.</p> <p>6.4 Design a procurement process that achieves a value for money outcome, including consideration of whole-of-life costs and benefits.</p> <p>6.5 Document detailed procurement plans and sub-plans for the various activities that will be conducted throughout the procurement process, including evaluation and reporting requirements.</p> <p>6.6 Plan prompt execution of financial delegations and other approvals.</p> <p>6.7 Undertake procurement activity in line with jurisdictional, organisational and best practice requirements for accountability and transparency, including record keeping and reporting regimes.</p> |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC507A Plan for procurement outcomes.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCM012 Plan for procurement outcomes

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking, consulting and negotiating with contractors and stakeholders
- writing a business case
- reading and applying complex documents, including contracts, legislation and guidelines
- providing feedback
- modelling effective team management approaches
- referring issues to the correct person
- resolving complicated procurement issues
- developing options for inclusion in a business case
- undertaking research and business analysis
- planning procurement processes in alignment with business and organisational goals
- documenting procurement planning decisions and expected outcomes
- managing and updating the procurement plan and sub-plans
- maintaining currency in best practice examples in procurement practice and relevant procurement legislation, policies and procedures
- using electronic procurement templates

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing and corporate social responsibility guidance
- organisational procurement policies, practices and approval processes
- procurement planning for complex procurement requirements and associated outcomes in alignment with business and organisational goals
- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to the procurement process
- government procurement environment
- legal requirements of government procurement
- implications of particular procurement arrangements
- whole-of-life considerations
- financial and accounting issues relevant to the procurement
- cultural issues relating to complex procurement and industry development in certain industry sectors
- relationship management

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPPCM013 Make procurement decisions

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC508A Make procurement decisions.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to perform advanced decision making for complex procurement within established guidelines, policies and procedures.

This unit applies to those working roles involved in making procurement decisions.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously, performing complex tasks, in a range of familiar and unfamiliar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Comply with legal and policy obligations implicit in making procurement decisions | <p>1.1 Identify and apply legislative and policy requirements and organisational objectives and goals to inform procurement decisions.</p> <p>1.2 Apply and manage probity principles of fairness and impartiality when making procurement decisions at all stages of the process.</p> |
| 2. Establish context for the procurement activity | <p>2.1 Identify and consider factors that may influence procurement decisions in the context of legislation, policy and organisational/business requirements to support effective decision making.</p> <p>2.2 Consult with stakeholders to determine likely impact of key factors at all stages of procurement process.</p> <p>2.3 Reflect determined key factors in procurement decisions affecting the procurement.</p> <p>2.4 Document factors affecting procurement decisions.</p> |
| 3. Select and approve procurement methods | <p>3.1 Select procurement methods based on jurisdictional, legislative and policy requirements and suitability for the procurement requirements.</p> <p>3.2 Consider factors and risks in selecting procurement method.</p> <p>3.3 Record justification for selected procurement method.</p> <p>3.4 Exercise approvals for the selection of procurement methods and record.</p> |
| 4. Select and approve contractual arrangements | <p>4.1 Select contractual arrangements, based on jurisdictional and policy requirements and suitability for the procurement requirements.</p> <p>4.2 Consider factors and risks in selecting contractual arrangements.</p> <p>4.3 Record justification for selected contractual arrangements.</p> <p>4.4 Exercise approvals for the selection of contractual arrangements and record.</p> |
| 5. Identify and consider factors affecting supplier choice | <p>5.1 Research and assess supplier capability as part of offer evaluation.</p> <p>5.2 Research and apply supplier supply chain management considerations in the context of policy requirements when making procurement decisions.</p> <p>5.3 Apply broader value for money considerations to support and</p> |

| | |
|---|---|
| | inform decisions. |
| 6. Conduct tender evaluation | <p>6.1 Form a tender evaluation panel or similar when required by policy or to meet probity requirements.</p> <p>6.2 Provide advice, support and guidance on procurement processes and probity requirements to members of the tender evaluation panel.</p> <p>6.3 Resolve any issues that arise during tender evaluation using negotiation and communication skills and procurement knowledge.</p> <p>6.4 Document tender decision-making processes and decisions reached in a format suited to the procurement being undertaken.</p> <p>6.5 Make written procurement recommendations to the approval delegate after considering advice of panel.</p> |
| 7. Maintain effective accountability and transparency in procurement decision making | <p>7.1 Maintain records, including plans and sub-plans, to provide an effective audit trail of decisions taken throughout the procurement process.</p> <p>7.2 Maintain compliance with jurisdictional and organisational procurement reporting requirements.</p> <p>7.3 Maintain records to provide aggregate procurement reporting requirements internal and external to the organisation.</p> |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC508A Make procurement decisions.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCM013 Make procurement decisions

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking, consulting and negotiating with contractors and stakeholders
- writing a business case
- reading and applying complex documents, including contracts, legislation and guidelines
- providing feedback
- resolving complicated procurement issues
- developing options for inclusion in a business case
- applying decision-making processes or methodologies
- undertaking research and business analysis
- documenting procurement decisions
- managing and updating procurement plans
- maintaining currency in best practice examples in procurement practice and relevant procurement legislation, policies and procedures
- operate organisational IT systems

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state or territory, and local government legislation, policies, practices and guidelines relating to procurement, including environmental purchasing and corporate social responsibility guidance

- organisational procurement policies, practices and approval processes
- procurement planning for complex procurement requirements and outcomes
- decision-making processes and methodologies
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement decisions
- government procurement environment
- legal requirements of government procurement
- implications of particular procurement arrangements
- whole-of-life considerations
- financial and accounting issues relevant to the procurement
- cultural issues relating to complex procurement and industry development in certain sectors
- relationship management

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
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PSPPCM015 Conduct and manage coordinated procurement

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC510A Conduct and manage coordinated procurement.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to identify and use existing coordinated procurement contracts (CPC) and cooperative procurement arrangements (CPA) to establish new CPAs across agencies and to arrange for organisations to procure under these contracts and arrangements.

This unit applies to those working in the public sector with responsibility for arranging the procurement of goods and services.

The skills and knowledge described in this unit must be applied within the legislative, and regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently, whilst performing complex tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Identify applicable existing CPCs, CPAs and opportunities | 1.1 Investigate availability and opportunities of CPCs and CPAs. 1.2 Identify and evaluate existing contracts at whole-of-government level and cross-agency arrangements. 1.3 Identify contract terms and assess conditions relating to contracts to determine whether the contract is relevant to the agency concerned. 1.4 Document criteria to identify applicable contracts and compliance with requirements for use. |
| 2. Arrange for organisation to procure under CPCs and CPAs | 2.1 Provide information and education about the contract and the requirement for its use to relevant staff. 2.2 Establish procedures to ensure that procurements are made under a CPC or CPA wherever possible, and place orders according to contract terms and conditions. 2.3 Record contractual dealings and report according to contract requirements including expenditure and realised savings. |
| 3. Lead cooperative procurements | 3.1 Obtain agreement of management for procurement where no CPAs exist, which would benefit multiple agencies 3.2 Develop a procurement strategy, procurement plan involving other agencies and procurement documents. 3.3 Undertake procurement process, evaluate responses and negotiate contract via cross-agency team. 3.4 Document new CPA and distribute to other agencies |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC510A Conduct and manage coordinated procurement.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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Assessment Requirements for PSPPCM015 Conduct and manage coordinated procurement

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">• Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with stakeholders
- using conceptual and reasoning skills to develop concise arguments
- writing reviews, reports, submissions and other complex documents
- applying decision-making processes and methodologies
- reading and applying the content of complex contracts, legislation and guidelines
- undertaking research and business analysis

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state/territory and local government legislation, policies, practices and guidelines relating to conducting and managing coordinated procurement, including environmental purchasing and corporate social responsibility guidance
- organisational procurement policies, practices and approval processes
- risk management procedures
- probity principles and issues
- best practice examples in procurement practice
- risks associated with financial and accounting issues relevant to conducting and managing coordinated procurement

- WHS, environmental, sustainability and corporate social responsibility practices in the context of conducting and managing coordinated procurement

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
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PSPPCM016 Plan and implement strategic sourcing

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC511 Plan and implement strategic sourcing.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to plan and implement strategic sourcing for goods or services essential or critical to an organisation's ability to conduct its core business. It includes developing a procurement profile of the buying organisation, conducting strategic assessment of the supply market, developing strategies to source goods or services from the market and securing, monitoring and reviewing strategic market sources.

This unit applies to those working in roles involving procurement of goods or services essential to the operation of their organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously consulting others as required, performing sophisticated tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|--|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Develop a procurement profile of the buying organisation | <p>1.1 Gather and analyse long term data about the strategic implications related to the buying organisation's level of spend on various types of goods and services, including how, where and from whom the goods or services are procured.</p> <p>1.2 Profile the organisation's existing suppliers, with particular emphasis on each supplier's capability and capacity, vulnerability, and adherence to Corporate Social Responsibility (CSR) principles, WHS, legislative compliance, market position and ownership structure.</p> <p>1.3 Identify and engage relevant communication strategies to engage internal, external and market stakeholders.</p> <p>1.4 Assess the buying organisation's market position (how the market views the organisation as a potential customer).</p> <p>1.5 Identify and consider opportunities and risks associated with developing a stronger market position as a buyer.</p> |
| 2. Conduct strategic assessment of the supply market | <p>2.1 Gather and analyse market information to determine capacity, competition, legislative and regulatory compliance, vulnerabilities and risk within the supply market.</p> <p>2.2 Monitor and analyse market trends and emerging changes to the current supply market place.</p> <p>2.3 Analyse and assess the supply market's ability to meet the buying organisation's needs, including supply chain management issues.</p> <p>2.4 Identify and assess innovative and/or creative opportunities within the market.</p> <p>2.5 Assess local and international supply market factors that may influence the ability to supply goods and services.</p> |
| 3. Develop strategies to source goods or services from the market | <p>3.1 Assess the suitability of current and emerging commercial trends within the market to the needs of the buying organisation.</p> <p>3.2 Identify and consider the application of commercial best practice models to strategic sourcing activities across the procurement life cycle.</p> <p>3.3 Identify and test possible benchmarks of better strategic sourcing</p> |

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| | <p>practice.</p> <p>3.4 Assess the suitability of alternative market sources of supply.</p> <p>3.5 Develop strategic supply market plans which reflect analysis of both the buying organisation and the supply market.</p> <p>3.6 Devise tendering strategies and type of contracting arrangement appropriate to the goods or services being procured and the nature of the supply market which will supply them, taking contract management strategies into consideration.</p> <p>3.7 Review the application of existing legislation, regulations, policies, practices and procedures to strategic sourcing activities and recommend changes to these where this would yield better results for the buying organisation or at the whole of government level.</p> |
| 4. Secure, monitor and review strategic market sources | <p>4.1 Conduct procurement processes which consider strategic sourcing issues and are appropriate to the goods and services being sought.</p> <p>4.2 Negotiate with potential suppliers to secure the best supply arrangements.</p> <p>4.3 Develop and implement transition plans from current to new market sources as needed to ensure a smooth transition and the continuous provision of strategic goods and services to the buying organisation.</p> <p>4.4 Implement contract management strategies to ensure that goods and services are delivered as contracted.</p> <p>4.5 Monitor and review new strategic sourcing arrangements for continuous improvement opportunities.</p> |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC511 Plan and implement strategic sourcing.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCM016 Plan and implement strategic sourcing

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none"> Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- networking, consulting and negotiating with the supply market, existing contractors and stakeholders
- writing a business case
- conducting market analysis and buying organisation analysis
- gathering and analysing organisational information to build procurement profile, market information and stakeholder requirements, and information on restricted products appropriate to the industry
- identifying, analysing and predicting trends
- applying complex government policy and inter-governmental agreements
- interrogating corporate systems, including Financial Management Information System (FMIS) or asset management system to obtain data
- analysing complex supply chains to identify risk, vulnerability and opportunity
- anticipating and interpreting market reaction
- planning procurement processes in alignment with business and organisational goals
- documenting procurement planning decisions and expected outcomes
- managing and updating procurement plans and sub-plans in line with strategic plans and budgets
- applying complex strategies to development of strategic plans, including corporate, budget and procurement plans and sub plans
- contributing to strategic and risk planning
- developing and managing electronic commerce
- exploiting market opportunities and initiatives in electronic commerce

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state and/or territory, or local government legislation, regulation, policies, practices, procedures and guidelines in relation to procurement, financial management, public sector obligations, consumer law, WHS, social policy and other relevant topics
- international treaties relevant to trade and procurement practices
- government and inter-governmental policy and agreements in relation to procurement practices
- principles and practices associated with Corporate Social Responsibility (CSR) principles, sustainability and environmental issues as applicable to procurement and market behaviours
- research and analysis as applied to complex outcomes, trends and predictions of markets and procurement changes
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement decisions
- micro and macro-economic issues applicable to market behaviours and the impact of procurement
- implications for the organisation and market (suppliers) of key procurement strategies and arrangements
- whole of life costing considerations and value for money
- financial, costing and accounting issues relevant to procurement and contracts
- cultural issues relevant to strategic procurement and industry development in specific markets or market sectors

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPPCM017 Plan and implement procurement category management

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC512 Plan and implement procurement category management.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to plan and implement procurement category management processes for an organisation.

This unit applies to those working in roles involving procurement of goods or services essential to the operation of their organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously consulting others as required, performing sophisticated tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Plan for category management | <p>1.1 Identify and assess organisational structures and business requirements from corporate planning documents in the context of suitability to adopt category management approaches for procurement and contract management.</p> <p>1.2 Develop and use effective communication strategies to engage with internal, external and market stakeholders about category management approaches, product and/or services to be category managed and market and supply chain conditions.</p> <p>1.3 Develop a category management plan based on category management principles for each category to be managed that includes outcome based, transparent and manageable performance metrics for category managed items and services.</p> <p>1.4 Obtain senior management approval for the category management plan.</p> <p>1.5 Develop outcome based processes and guidelines to support category management.</p> <p>1.6 Identify staff skills and training and development opportunities related to category management and incorporate these into professional development plans.</p> <p>1.7 Identify and interrogate organisational Enterprise Resource Planning (ERP) and document management systems in order to gather and analyse data pertaining to the level of spend on various procurement types.</p> |
| 2. Define categories | <p>2.1 Identify and analyse current procurement options adopted by the organisation and other procurement options that are available in the marketplace.</p> <p>2.2 Identify market, procurement and contract management trends, opportunities and risks relevant to categories.</p> <p>2.3 Identify and engage relevant internal stakeholders to assist in defining categories.</p> <p>2.4 Define procurement categories using a recognised basis.</p> <p>2.5 Identify and implement appropriate systems to support category and contract managers.</p> |

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| 3. Implement category management | <p>3.1 Develop market strategies for categories and act on them as appropriate to the organisation.</p> <p>3.2 Implement the category management plan.</p> <p>3.3 Implement strategies to manage and maintain productive relationships with identified suppliers.</p> <p>3.4 Resolve operational issues raised by contract users and suppliers.</p> <p>3.5 Capture and analyse data from a range of sources about the category performance against the performance metrics on a regular basis and report category performance to appropriate corporate systems.</p> <p>3.6 Regularly review buying organisation, industry and market category positions to identify trends, opportunities and risks and adjust direction as indicated by the results of the review.</p> |
| 4. Review category management | <p>4.1 Review and monitor performance metrics on a regular basis to ensure efficiency and effectiveness is achieved and maintained in category management processes.</p> <p>4.2 Consult appropriately with stakeholders, provide performance feedback and recommend corrective or improvement actions as necessary.</p> <p>4.3 Monitor buying organisation, industry and market performance and ensure organisational strategies are modified where appropriate.</p> <p>4.4 Monitor staff skills and provide appropriate skilling upgrades.</p> |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC512 Plan and implement procurement category management.

Links

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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Assessment Requirements for PSPPCM017 Plan and implement procurement category management

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- developing a business case
- interpreting and applying complex documents, including contracts, legislation and policy guidelines
- gather and analyse organisational data, market data and stakeholder requirements
- identifying, analysing and predicting trends
- planning, monitoring and implementing change management strategies
- modelling effective team management approaches
- supporting professional development and learning in team members
- responding to and managing issues that arise
- interrogating corporate systems to obtain data
- analysing complex supply chains to identify risk, vulnerability and legality
- developing effective performance measurement metrics
- documenting procurement planning decisions and anticipated outcomes
- managing and updating procurement plans and sub-plans in line with organisational, strategic and budget planning documents
- applying complex strategies to develop organisational plans, including corporate, budget and procurement plans and sub plans
- maintaining currency of best practice models relevant to procurement, contracting, logistics and enterprise market management and legislation, regulation, policy, government agreements and relevant legal decisions

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state and/or territory, or local government legislation, regulation, policies, practices, procedures and guidelines in relation to procurement and financial management
- international treaties relevant to trade and procurement practices
- government and inter-governmental policy and agreements in relation to procurement practices
- principles and practices associated with Corporate Social Responsibility (CSR), sustainability and environmental issues as applicable to procurement and market behaviours
- research and analysis as applied to complex outcomes, trends and predictions of markets and procurement changes
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement decisions
- micro and macro-economic issues applicable to market behaviours and the impact of procurement
- legal issues and determinations impacting on procurement
- implications for the organisation and for the market (suppliers) of key procurement strategies and/or arrangements
- whole of life costing considerations and value for money
- financial, costing and accounting issues relevant to procurement and contracts
- cultural issues relevant to procurement and industry development in specific markets or market sectors

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
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PSPPCM018 Conduct demand and procurement spend analysis

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPROC513 Conduct demand and procurement spend analysis.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to manage demand and procurement spend within an organisation.

This unit applies to those working in roles involving procurement of goods or services essential to the operation of their organisation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work autonomously with management responsibilities, while performing complex tasks in familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Procurement

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|--|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Collect and analyse demand and procurement spend data | <p>1.1 Identify and analyse demand patterns (organisational consumption), using a range of data sources and using appropriate breakdowns such as by category, region or time period.</p> <p>1.2 Identify and analyse procurement spend data, using a range of data sources and using appropriate breakdowns, including by category, region or time period.</p> <p>1.3 Establish and analyse the relationship between demand, consumption and procurement spend and assess business complexity of the buying organisation based on this analysis.</p> <p>1.4 Develop product usage profiles and organisational spend profiles.</p> <p>1.5 Establish causal links for demand and spend patterns through engagement with internal stakeholders and analysis of data.</p> <p>1.6 Map and analyse processes involved across the whole procurement life cycle to identify potential for efficiencies and improved data gathering.</p> <p>1.7 Review organisational policies and processes for procurement, asset management and budget, assess the impact of these on demand and/or spend and make recommendations to improve management of demand.</p> |
| 2. Develop and implement demand/spend management strategy | <p>2.1 Develop and implement effective communication strategies to engage internal stakeholders, external and market stakeholders.</p> <p>2.2 Develop and implement outcome based demand and/or spend management processes across the procurement life cycle.</p> <p>2.3 Identify and use appropriate systems to support procurement and financial processes.</p> <p>2.4 Develop and implement processes to control and manage the demand for particular goods and services according to influencing factors.</p> <p>2.5 Identify staff skills and training and development opportunities related to demand and/or procurement spend management and incorporate these into professional development plans.</p> <p>2.6 Develop outcome based, transparent and manageable performance metrics to ensure best practice is achieved, whilst satisfying organisational needs.</p> |
| 3. Manage demand/spend | <p>3.1 Review and analyse the market profile, including opportunities to influence or develop the market.</p> |

| | |
|--------------------------------|---|
| risks and opportunities | <p>3.2 Identify and assess market dynamics including market cycles, product life cycles and growth and/or decline.</p> <p>3.3 Assess realistically the desirability and practicality of ongoing market development and undertake market development activities where these are appropriate.</p> <p>3.4 Identify and consider opportunities and risks associated with managing demand and procurement spend.</p> |
|--------------------------------|---|

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPROC513 Conduct demand and procurement spend analysis.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

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Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCM018 Conduct demand and procurement spend analysis

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion.

- consulting and negotiating with the market place, contractors and stakeholders
- interpreting complex documents
- gathering and analysing organisational data to build demand and spend profiles, market data, and stakeholder requirements.
- planning, monitoring and implementing change management strategies
- promoting change within the organisation
- measuring and monitoring performance
- celebrating success
- applying the content of complex documents, including contracts, legislation and policy guidelines
- applying complex government policy and inter-governmental agreements
- interrogating corporate systems to obtain data
- analysing complex supply chains to identify risk, vulnerability and opportunity
- interpreting market reaction
- developing effective performance measurement metrics
- planning procurement processes in alignment with business and organisational goals
- documenting procurement planning decisions and expected outcomes
- managing and updating procurement plans and sub-plans in line with strategic plans and budgets
- applying complex strategies to development of strategic plans, including corporate, budget and procurement plans and sub plans
- contributing to strategic and risk planning

- understanding systems architecture
- identifying needs from ERPs
- exploiting organisational ERPs
- developing and managing electronic commerce
- exploiting market opportunities and initiatives in electronic commerce

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- Commonwealth, state and/or territory, or local government legislation, regulation, policies, practices, procedures and guidelines in relation to procurement and financial management
- international treaties relevant to trade and procurement practices
- government and inter-governmental policy and agreements in relation to procurement practices
- principles and practices associated with Corporate Social Responsibility (CSR) principles, sustainability and environmental issues as applicable to procurement and market behaviours
- complex and strategic planning
- research and analysis as applied to complex outcomes, trends and predictions of markets and procurement changes
- codes of conduct, codes of practice and standards of individual behaviour relating to procurement decisions
- government procurement environment
- micro and macro-economic issues applicable to market behaviours and the impact of procurement
- implications for the organisation and market (suppliers) of key procurement strategies and/or arrangements
- whole of life costing considerations and value for money
- financial, costing and accounting issues relevant to procurement and contracts
- cultural issues relevant to strategic procurement and industry development in specific markets or market sectors

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PSPPCY004 Support policy implementation

Modification History

| Release | Comments |
|---------|--|
| 1 | <p>This unit was released in PSP Public Sector Training Package release 1.0 and meets the Standards for Training Packages.</p> <p>This unit supersedes and is equivalent to PSPPOL404A Support policy implementation.</p> <ul style="list-style-type: none">• Unit code updated• Content and formatting updated to comply with new standards• All PC transitioned from passive to active voice |

Application

This unit describes the skills required to identify, implement and monitor relevant policy and report on implementation.

This unit applies to public sector staff and other stakeholders working in a role where they are required to support policy implementation.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to.

Those undertaking this unit would work independently. They would perform routine tasks in a range of familiar contexts.

No licensing, legislative or certification requirements apply to unit at the time of publication.

Competency Field

Policy

Elements and Performance Criteria

| ELEMENTS | PERFORMANCE CRITERIA |
|---|---|
| Elements describe the essential outcomes | Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions section. |
| 1. Identify relevant policy | 1.1 Identify work situations that are shaped by government or organisation policy. 1.2 Identify and locate policy relating to particular work situations. |
| 2. Implement policy | 2.1 Interpret policy to be implemented to identify and plan for change in work practices. 2.2 Identify the implications of policy for individual work practices, confirm and adjust practices to reflect policy requirements. 2.3 Support others affected by policy requirements to accommodate those requirements. |
| 3. Monitor and report on policy implementation | 3.1 Gather, record and report information that will assist with the evaluation of the effectiveness of policy implementation. 3.2 Gather, record and report information that will assist with evaluation of policy impact on organisational outcomes. |

Foundation Skills

Foundation skills are embedded within the elements and performance criteria of this unit.

Unit Mapping Information

This unit supersedes and is equivalent to PSPPOL404A Support policy implementation.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
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<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Assessment Requirements for PSPPCY004 Support policy implementation

Modification History

| Release | Comments |
|---------|---|
| 1 | <p>These Assessment Requirements were released in PSP Public Sector Training Package release 1.0 and meet the Standards for Training Packages.</p> <ul style="list-style-type: none">Assessment Requirements created drawing upon specified assessment information from superseded unit |

Performance Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the candidate must demonstrate evidence of performance of the following on at least one occasion:

- reading complex and formal documents and providing information on their application
- preparing accurate written reports with language and structures suited to the intended audience
- working with legislation drafters and legal advisers
- consulting on and preparing policy guidelines
- adjusting communication to suit different audiences
- gathering and analysing policy feedback

Knowledge Evidence

Evidence required to demonstrate competence must satisfy all of the requirements of the elements and performance criteria. If not otherwise specified the depth of knowledge demonstrated must be appropriate to the job context of the candidate.

- practices and procedures for developing policy guidelines
- policy feedback mechanisms
- current organisation policies
- government policies and international policy obligations that impact on organisation policy
- organisation and government procedures and protocols
- public sector codes of ethics and code/s of conduct

Assessment Conditions

This unit contains no specific industry-mandated assessment conditions. Guidance on suggested and recommended conditions and methods can be found in the Implementation Guide.

Assessors must satisfy the NVR/AQTF mandatory competency requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=bebbece7-ff48-4d2c-8876-405679019623>

PUACOM008 Develop and organise public safety awareness programs

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Application

This unit of competency involves the skills and knowledge required to develop, implement and evaluate public safety awareness programs. It includes determining scope of program and developing, implementing and evaluating the effectiveness of public safety awareness programs.

The unit is applicable to personnel who formally liaise with other organisations to increase response effectiveness and community safety.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Pre-requisite Unit

The fire sector is those sections of government departments, statutory authorities or organisations that have responsibility under jurisdictional arrangements for the delivery of firefighting and fire management services.

It is essential that the prerequisite units listed below are obtained prior to the issuance of this unit to individuals within the fire sector or the units contributing to the attainment of a fire qualification.

PUACOM006 Plan and conduct a public awareness program

Competency Field

Community Programs

Unit Sector

Public Safety

Elements and Performance Criteria

ELEMENTS

PERFORMANCE CRITERIA

Elements describe the essential Performance criteria describe the performance needed to

outcomes.

demonstrate achievement of the element.

1 Determine scope of program

- 1.1** Research and analysis is undertaken to determine need for a public safety awareness program
- 1.2** Target audience and characteristics are defined to inform public safety awareness program planning
- 1.3** Public safety awareness program aims and objectives are specified and performance measures are identified

2 Develop program

- 2.1** Program type, implementation and support requirements to meet needs of target audiences and organisational objectives is determined
- 2.2** Sponsorship and/or joint venture opportunities are investigated to maximise public safety awareness program effectiveness
- 2.3** Resource options to implement public safety awareness program are developed and preferred options are selected
- 2.4** Resources are accessed to develop public safety awareness program
- 2.5** A pilot public safety awareness program is conducted and its effectiveness is assessed and changes are made, as required

3 Implement program

- 3.1** Constraints and opportunities for implementing public safety awareness programs are identified
- 3.2** Production of resources is managed to ensure that relevant materials are available in sufficient quantities
- 3.3** Public safety awareness program is managed to meet agreed performance indicators within budget
- 3.4** Ongoing monitoring of public safety awareness program is undertaken during implementation phase

4 Evaluate effectiveness of program

- 4.1** Public safety awareness program evaluation is conducted against performance measures
- 4.2** Adjustments are made to public safety awareness program to reflect evaluation outcomes and feedback received

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

Unit Mapping Information

This unit replaces and is equivalent to PUACOM008B Develop and organise public safety awareness programs.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf>

Assessment Requirements for PUACOM008 Develop and organise public safety awareness programs

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria on at least one occasion and includes

- designing and managing public safety awareness program
- determining and applying performance measures
- determining scope of public safety awareness program
- developing public safety awareness program
- evaluating effectiveness of public safety awareness program
- following organisational policies and procedures including Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements
- implementing public safety awareness program
- meeting public safety awareness program budgeting requirements
- researching and analysing public safety awareness program needs
- using educational support materials

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements, performance criteria and range of conditions and includes knowledge of

- application of performance measures
- current principles and practices relating to developing public education programs
- educational principles
- materials and resources required for public safety awareness programs
- organisational documentation, policies and procedures including Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements
- public safety awareness program constraints
- research and analysis for public program development
- target audiences

Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Assessment must occur in workplace operational situations. Where this is not appropriate, assessment must occur in industry approved simulated workplace operational situations that reflect workplace conditions.

Resources for assessment must include access to

- a range of relevant exercises, case studies and/or simulations
- relevant and appropriate materials, equipment, tools and personal protective clothing and equipment currently used in industry
- applicable documentation including organisational procedures, industry standards, regulations, equipment specifications, codes of practice and operation manuals.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf>

PUAFER001 Identify, prevent and report potential facility emergency situations

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Application

This unit of competency involves the skills and knowledge required by occupants to identify and prevent the development of facility emergency situations or to minimise their consequences, and to report if emergency protection systems and/or equipment is compromised.

It applies to a broad range of emergencies and covers the work required before an emergency services and/or specialist response team arrives; it does not include the specific use of equipment to prevent facility emergency situations.

The unit has been developed to cover facilities as specified in Australian Standard 3745 and AS 4083. For this unit, as covered by AS 3745 and/or AS4083, occupants are people attending a facility on a permanent or temporary basis such as an employee, contractor, student or resident, but not a visitor or patient and a facility is a building, structure or workplace that is, or may be, occupied by people (occupants).

All aspects of the unit must be undertaken in accordance with legislative requirements, organisational policies and procedures and approved safe practices. It applies to occupants who are required to be 'emergency aware' in their facility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Pre-requisite Unit

Not applicable.

Competency Field

Facility Emergency Response

Unit Sector

Public Safety

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1 Identify, monitor and report situations that could lead to facility emergencies

2 Identify, report and correct situations that could prevent facility emergencies from being safely handled

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- | | |
|------------|---|
| 1.1 | Situations that could lead to facility emergencies are identified by the occupant and facility emergency response procedures are followed |
| 1.2 | Immediate work area and/or public area is routinely checked for situations that could lead to emergencies |
| 1.3 | High risk activities are monitored to ensure precautions and facility emergency response procedures are followed |
| 2.1 | Relevant emergency protection systems and equipment are identified |
| 2.2 | Situations that could lead to emergency protection systems and equipment being impaired are identified |
| 2.3 | Immediate work area is routinely checked for situations that could lead to emergency protection systems and equipment being made inoperable and results of check are reported |

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

- | | |
|---|--|
| high risk activities must include three or more of the following relevant to the facility | <ul style="list-style-type: none"> • handling dangerous goods and hazardous materials including waste • handling gases |
|---|--|

emergency protection systems and equipment must include three or more of the following relevant to the facility

- hot work
- manual handling
- manufacturing
- using, mixing and/or moving chemicals
- working around traffic
- working at heights, in confined spaces, in poorly ventilated spaces or around noise - subject to permit
- working with plant and machinery
- working with unstable equipment or equipment that has deteriorated
- access, egress and paths of travel
- alarm initiation devices
- any specific dangerous good and/or hazardous chemical antidotes and treatment e.g. corrosives
- automatic fire, leak, spill or movement detectors
- escape equipment
- exit signs and emergency lighting
- facility emergency response procedures contained within the facility emergency plan
- fire or smoke detection,
- fire or smoke doors, fire walls
- first aid kits
- initial response firefighting equipment
- occupant warning and communications systems
- shower and eyewash
- special hazard identification systems
- spill or leak containment equipment
- suppression systems
- emergency equipment not being maintained
- emergency lighting and/or exit lighting being damaged, missing
- impairing exits and/or pathways to exits
- inability to access emergency equipment
- inappropriate or non-compliant storage and/or handling of dangerous goods
- interfering with alarm systems
- not replacing or replenishing used emergency equipment
- not reporting damage to emergency

situations that could lead to emergency protection systems and equipment being impaired must include three or more of the following relevant to the facility

- equipment or facilities
- propping open fire or smoke doors

Unit Mapping Information

This unit replaces and is equivalent to PUAWER001B Identify, prevent and report potential facility emergency situations.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf>

Assessment Requirements for PUAFER001 Identify, prevent and report potential facility emergency situations

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements, performance criteria and range of conditions on at least one occasion and includes

- communicating with team members and stakeholders
- identifying and reporting situations in a facility that reduce the effectiveness of emergency protection systems and equipment
- identifying emergency protection systems and equipment present in a facility
- identifying, monitoring and reporting situations that could lead to emergencies in a facility

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements, performance criteria and range of conditions and includes knowledge of

- basic types emergency protection systems and equipment
- principles of operation and limitations of emergency protection systems and equipment installed in a facility
- procedures for identifying, minimising, or preventing, and reporting situations within a facility that may lead to an emergency
- safe work practices applicable to a facility that help to prevent emergencies
- situations at a facility that reduce the effectiveness of emergency protection systems and equipment

Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Assessment must occur in workplace operational situations. Where this is not appropriate, assessment must occur in industry approved simulated workplace operational situations that reflect workplace conditions.

Resources for assessment must include access to

- a range of relevant activities, exercises, case studies and/or simulations
- relevant and appropriate materials, equipment, tools and personal protective clothing and equipment currently used in industry
- applicable documentation including organisational procedures, facility emergency response procedures, industry standards, equipment specifications, regulations, codes of practice and operation manuals.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf>

PUAFER004 Respond to facility emergencies

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Application

This unit of competency involves the skills and knowledge required by occupants to recognise emergencies in a facility, to report emergencies and to take appropriate action during facility emergency situations. It includes preparing for emergency situations, reporting emergencies, responding to emergency warnings and advice, choosing the most appropriate course of action and evacuating from a danger area.

The unit has been developed to cover the facilities as specified in Australian Standard (AS) 3745 and AS4083. For this unit, as covered by AS3745 and AS4083, occupants are people attending a facility on a permanent or temporary basis such as an employee, contractor, student, resident but not a visitor or patient and a facility is a building, structure or workplace that is, or may be, occupied by people (occupants).

All aspects of the unit must be undertaken in accordance with legislative requirements, organisational policies and procedures and accepted safe practices. It applies to occupants who are required to be 'emergency aware' in their facility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Pre-requisite Unit

Not applicable

Competency Field

Facility Emergency Response

Unit Sector

Public Safety

Elements and Performance Criteria

ELEMENTS

PERFORMANCE CRITERIA

Elements describe the essential Performance criteria describe the performance needed to

outcomes.

demonstrate achievement of the element.

1 Prepare for emergency situations

- 1.1** Facility emergency procedures to be used by occupants are identified and followed
- 1.2** Emergency resources in a facility are identified and located
- 1.3** Emergency response exercises are participated in, in accordance with facility emergency procedures

2 Report emergencies

- 2.1** Emergencies are identified and reported, in accordance with facility emergency procedures
- 2.2** Occupants in any immediate danger from an emergency or potential emergency are alerted, in accordance with facility emergency procedures

3 Respond to emergency warnings and advice

- 3.1** Emergency warnings and advice are responded to, in accordance with facility emergency procedures
- 3.2** Instructions from emergency control organisation or attending emergency services are complied with during an emergency

4 Choose most appropriate course of action

- 4.1** Emergencies that require evacuation are determined
- 4.2** Emergencies that require occupants to shelter-in-place (no evacuation) are determined
- 4.3** Shelter or refuge is assessed to determine suitability and sustainability when a shelter-in-place response is the preferred option
- 4.4** Emergencies that require lockdown are determined
- 4.5** Appropriate cover is assessed when lockdown is required

5 Evacuate from danger area

- 5.1** Need to evacuate from danger area is determined and issued under facility emergency procedures
- 5.2** Work area is prepared for evacuation, in accordance with facility emergency procedures
- 5.3** Area of danger is evacuated, in accordance with facility emergency procedures
- 5.4** Where it is safe to do so, assistance is provided to

occupants who may require it

- 5.5 Evacuation procedures and instructions from emergency control organisation or emergency response personnel are followed
- 5.6 Alternative pathways or methods of evacuation are identified, assessed and chosen, in accordance with facility emergency procedures, if usual means of evacuation are blocked or occupants are endangered
- 5.7 Communication system is used to respond to facility emergencies, in accordance with facility procedures

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

Unit Mapping Information

This unit replaces and is equivalent to PUAWER004B Respond to facility emergencies.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf>

Assessment Requirements for PUA FER004 Respond to facility emergencies

Modification History

Release 1. This is the first release of this unit of competency in the PUA Public Safety Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria on at least one occasion and includes

- applying Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements
- complying with legislation, industry standards, codes of practice and regulations
- evacuating from work area
- following facility emergency procedures and direction of emergency control organisation members and/or attending emergency services
- identifying and evacuating occupants who may require assistance
- identifying and reporting emergencies
- maintaining own safety and the safety of others in emergency situations
- participating in emergency response exercises including briefings, debriefings, simulations, reviews and desk top drills
- preparing for emergency situations
- responding to emergency warnings and advice
- selecting the most appropriate course of action during an emergency

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria and includes knowledge of

- circumstances where evacuation may need to be modified
- emergency response exercises including participation in briefings and debriefings
- evacuation alarms and facility emergency procedures including action to take when evacuation to a location external to the building might expose evacuated occupants and/or personnel to a greater level of danger
- facility emergency documentation, policies and procedures
- facility emergency reporting systems and procedures facility emergency warning system, signals and instructions
- legislation, industry standards, codes of practice and regulations
- locations of assembly areas and post evacuation actions

- locations of emergency equipment in a facility
- roles, responsibilities and authority of emergency personnel, emergency control organisations and emergency response teams
- types of emergencies, hazards and evacuation actions associated with each one
- types of occupants who may require assistance
- where Personal Emergency Evacuations Plans (PEEPs) for occupants who have a disability are kept
- Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements

Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Assessment must occur in workplace operational situations. Where this is not appropriate, assessment must occur in industry approved simulated workplace operational situations that reflect workplace conditions.

Resources for assessment must include access to

- a range of relevant exercises, case studies and/or simulations
 - that reflect emergency situations that may occur in a facility and include shelter in place, partial evacuation and/or full evacuation
- relevant and appropriate materials, equipment, tools and personal protective clothing and equipment currently used in industry
- applicable documentation including organisational policies, facility emergency plan, facility emergency response procedures, industry standards, equipment specifications, regulations, codes of practice and operation manuals.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf>

PUAWHS003 Implement and monitor organisational work, health and safety policies, procedures and programs

Modification History

Release 1. This is the first release of this unit of competency in the Public Safety Training Package.

Application

This unit of competency involves the skills and knowledge required to implementing and monitoring Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) policies, procedures and safety awareness programs in the work place.

The unit is applicable to personnel who perform legislated or delegated roles within a public safety organisation and who are required to ensure WHS/OHS policy and procedures are implemented in specific teams and/or work groups.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Pre-requisite Unit

Not applicable

Competency Field

Work, Health and Safety

Unit Sector

Public Safety

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1 Provide WHS/OHS information to work

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1** Relevant provisions of Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) legislation and codes of practice are accurately and clearly explained to team and/or work group

- | | | |
|---|------------|---|
| | 1.2 | Information on organisational WHS/OHS policies, procedures and safety awareness programs are provided and are clearly explained to the team and/or work group |
| | 1.3 | Existing hazard information, risk assessment and control procedures are provided and is clearly explained to the team and/or work group |
| 2 Implement and monitor participative arrangements for management of WHS/OHS | 2.1 | WHS/OHS procedures for team and/or work group consultation are implemented and monitored to ensure all members have an opportunity to contribute |
| | 2.2 | Issues raised through consultation resolved promptly or are referred to appropriate personnel for resolution, in accordance with organisational procedures |
| | 2.3 | Outcomes of consultations are communicated to the team and/or work group promptly |
| 3 Implement and monitor organisational procedures for controlling risks | 3.1 | Existing and potential hazards in the workplace or area are identified and reported, in accordance with organisational procedures |
| | 3.2 | Organisational procedures to control risks are implemented and monitored by team and/or work group |
| | 3.3 | Existing risk control measures are monitored, and results are reported, in accordance with organisational procedures |
| | 3.4 | Existing risk control measures are reviewed, in accordance with the hierarchy of risk control and any variations are reported to designated personnel |
| | 3.5 | Inadequate resource allocation for implementation of risk control measures are identified and reported to designated personnel |
| 4 Implement organisational procedures for dealing with hazardous events | 4.1 | Organisational procedures for dealing with hazardous events are implemented, as required, to ensure prompt control action is undertaken |
| | 4.2 | Hazardous events are investigated to identify cause of the event, in accordance with organisational procedures |
| | 4.3 | Control measures to prevent recurrence and minimise risk of hazardous events are implemented based on the |

hierarchy of risk control or are referred to designated personnel for implementation

5 Implement and monitor organisational procedure for providing safety awareness training

- 5.1** Safety awareness training needs are identified from specified WHS/OHS competencies currently held by team and/or work group members
- 5.2** WHS/OHS training needs are identified, and training arrangements are implemented, in consultation with relevant personnel

6 Implement and monitor organisational procedures for maintaining WHS/OHS records

- 6.1** WHS/OHS records for work place or area are accurately completed, in accordance with organisational requirements
- 6.2** Information from WHS/OHS records is used to identify hazards and monitor risk control procedures within work place or area, in accordance with organisational procedures and duty of care responsibilities

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

Unit Mapping Information

This unit replaces and is equivalent to PUAOHS003B Implement and monitor the organisation's occupational health and safety policies, procedures and programs.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf>

Assessment Requirements for PUAWS003 Implement and monitor organisational work, health and safety policies, procedures and programs

Modification History

Release 1. This is the first release of this unit of competency in the Public Safety Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria on at least one occasion and includes

- applying Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) requirements
- communicating information orally and in writing
- completing organisational documentation
- implementing and monitoring participative arrangements for the management of WHS/OHS organisational requirements
- implementing safety awareness programs
- providing WHS/OHS information and organisational policies, procedures and safety awareness programs to team and/or work group
- working with organisational policies and implementing and monitoring organisational procedures for identifying hazards and assessing risks, controlling hazards and risks, dealing with hazardous events, providing safety awareness training and maintaining WHS/OHS records

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all the requirements of the elements and performance criteria and includes knowledge of

- duty of care obligations and responsibilities
- emergency services including contact details and availability
- hazardous events
- hierarchy of risk control including elimination of hazards, substitute hazard with something safer, isolate hazard from people, reduction of risk through engineering controls, reduction of exposure to hazard using administrative actions and use of personal protection clothing and equipment
- organisational documentation, policies and procedures including implementing accident investigations, completing accident reporting and dealing with hazardous event procedures
- principles and procedures relating to organisational Work, Health and Safety (WHS)/Occupational Health and Safety (OHS) policies and procedures

- provisions of WHS/OHS legislated requirements
- root cause analysis requirements
- safety awareness programs
- work place or area layout

Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the Standards for Registered Training Organisations current at the time of assessment.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Assessment must occur in workplace operational situations. Where this is not appropriate, assessment must occur in industry approved simulated workplace operational situations that reflect workplace conditions.

Resources for assessment must include access to

- a range of relevant exercises, case studies and/or simulations
- relevant and appropriate materials, equipment, tools and personal protective clothing and equipment currently used in industry
- applicable documentation including organisational policies and procedures, industry standards, equipment specifications, regulations, codes of practice and operation manuals.

Links

PUA Training Package Companion Volume Implementation Guide is found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=3eca5672-6d5a-410b-8942-810d0ba05bbf>

RIIVEH305E Operate and maintain a four wheel drive vehicle

Modification History

| Release | Comment |
|---------|--|
| 1 | This unit replaces RIIVEH305D Operate and maintain a four wheel drive vehicle. Amended element 5 and performance evidence to use of recovery equipment and remove use of snatch straps. Added mapping table. |

Application

This unit describes the skills and knowledge required to operate and maintain a four wheel drive vehicle in the Resources and Infrastructure Industries.

This unit is appropriate for those working in supervisory and technical specialist roles.

Licensing, legislative, regulatory and certification requirements that apply to this unit can vary between states, territories, and industry sectors. Relevant information must be sourced prior to application of the unit.

Elements and Performance Criteria

| | |
|---|--|
| 1. Identify four-wheel drive specific terms, terminology and techniques | <p>1.1 Access, interpret and apply four wheel drive vehicle documentation and ensure the work activity is compliant</p> <p>1.2 Identify the structural and handling differences between a conventional two wheel drive and a four-wheel drive vehicle</p> <p>1.3 Identify and demonstrate the purpose and use of front wheel hubs</p> <p>1.4 Identify factors affecting tyre size, fitment, rating, and pressure</p> <p>1.5 Identify recovery hooks and mounting features</p> <p>1.6 Identify hazards associated with incorrect use of vehicle features or equipment</p> |
| 2. Plan for minimal environmental impact | <p>2.1 Determine types of impact likely to occur during four-wheel driving activities</p> <p>2.2 Demonstrate compliance with land management principles and policies when planning exploration activities</p> <p>2.3 Comply with policies and management plans relevant to the activity area</p> <p>2.4 Plan and conduct activities in a manner which minimises</p> |

| | |
|---------------------------------|---|
| | <p>environmental impact</p> <p>2.5 Adopt and implement procedures to ensure minimisation of harm to the environment from four-wheel drive activities</p> <p>2.6 Demonstrate cooperation and consideration towards other land users</p> |
| 3. Perform pre-departure checks | <p>3.1 Perform routine pre-departure checks under the bonnet, under the body, on external and internal items and accessories</p> <p>3.2 Take action to correct any deficiency</p> <p>3.3 Determine food and water requirements for journey</p> <p>3.4 Select navigation equipment</p> <p>3.5 Interpret weather conditions, determine suitability for driving</p> <p>3.6 Apply safe vehicle loading practices</p> <p>3.7 Secure items of personal luggage</p> <p>3.8 Advise passengers of any special safety precautions to be taken when traversing rough terrain</p> |
| 4. Use four-wheel drive mode | <p>4.1 Operate four-wheel drive both on and off road, in accordance with road rules, principles of four-wheel driving and WHS regulations</p> <p>4.2 Apply smooth accelerator control strategies over a range of terrain types</p> <p>4.3 Demonstrate recommended braking techniques for hard top surfaces and off road conditions</p> <p>4.4 Identify situations where the engagement of four-wheel drive is required</p> <p>4.5 Engage four-wheel drive mode</p> <p>4.6 Survey track to identify hazards, assess risk and select a best route</p> <p>4.7 Select routes to minimise damage to the environment</p> <p>4.8 Use appropriate range, gear, speed, driving and braking technique, negotiate a range of terrain types whilst maintaining control of vehicle, being aware of contextual/environment issues</p> <p>4.9 Maintain appropriate hand positioning on steering wheel</p> <p>4.10 Check brakes and undercarriage after negotiating varying terrain</p> <p>4.11 Assess and perform repairs to damaged tracks</p> <p>4.12 Use standard operating procedures when travelling in company with other vehicles</p> |
| 5. Coordinate and | <p>5.1 Apply work procedures to ensure risk assessment, safe</p> |

| | |
|---|---|
| recover a vehicle | <p>operating practices, and communication requirements are adhered to</p> <p>5.2 Identify equipment and methods to recover a stuck vehicle</p> <p>5.3 Identify risks associated with vehicle recovery and develop and implement strategies to minimise risks</p> <p>5.4 Identify correctly rated recovery equipment and attachment points</p> <p>5.5 Demonstrate procedures for preparing vehicles for recovery</p> <p>5.6 Identify techniques to minimise impact on the environment during vehicle recovery</p> <p>5.7 Coordinate safe recovery of a four-wheel drive vehicle using designated equipment and recovery method</p> <p>5.8 Perform post recovery checks and report any vehicle or environmental repairs needed</p> <p>5.9 Return recovery equipment to a reusable condition</p> |
| 6. Perform maintenance and minor repairs on four-wheel drive vehicles | <p>6.1 Select/access maintenance equipment, including spares and fluids, prior to departure, considering contextual issues of the trip</p> <p>6.2 Check vehicles prior to and regularly during trip, and perform routine maintenance/repair tasks</p> <p>6.3 Submit vehicle written performance reports</p> <p>6.4 Demonstrate safe use of a jack to change a wheel on a four-wheel drive vehicle</p> |

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit. Further information is available in the Resources and Infrastructure Industry Training Package Companion Volume.

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|-----------------------|
| RIIVEH305E Operate and maintain a four wheel drive vehicle | RIIVEH305D Operate and maintain a four wheel drive vehicle | Amended element 5 and performance evidence to use of recovery equipment and remove use of snatch straps. Added mapping table. | Not equivalent |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272>

Assessment Requirements for RIIVEH305E Operate and maintain a four wheel drive vehicle

Modification History

| Release | Comment |
|---------|---|
| 1 | This unit replaces RIIVEH305D Amended element 5 and performance evidence to use of recovery equipment and remove use of snatch straps. Added mapping table. |

Performance Evidence

- Evidence is required to be collected that demonstrates a candidate's competency in this unit. Evidence must be relevant to the roles within this sector's work operations and satisfy all of the requirements of the performance criteria of this unit and include evidence that the candidate:
- locates and applies relevant documentation, policies and procedures
- works effectively with others to undertake and complete effective operation and maintenance of a four wheel drive vehicle to meet all required outcomes including:
 - preparing for and organising work activities to meet all task requirements
 - communicating clearly and concisely with others to receive and clarify work instructions
 - using a range of communication techniques and aids to advise others of work activity
- demonstrates completion of the operation and maintenance of a four wheel drive vehicle that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
 - performing pre-departure checks
 - selecting and programming navigation equipment
 - operating a four wheel drive vehicle on and off road
 - applying correct braking techniques according to terrain
 - engaging four wheel drive mode
 - carrying out stop stall key start recovery procedures (only applies to manual licencees)
 - selecting routes and applying techniques to minimise damage to the environment
 - identifying and using multiple types of recovery equipment
 - performing recovery of four wheel drive
 - operating a jack to support a four wheel drive on unstable ground

Knowledge Evidence

The candidate must demonstrate knowledge of the following when operating and maintaining a four wheel drive vehicle:

- problem solving skills for operation and maintenance of a four wheel drive vehicle
- handover procedures
- technical information, including manufacturer's manuals related to operation and maintenance of a four wheel drive vehicle
- operating vehicles within specifications and limitations
- faults in vehicles and ancillary equipment
- driving techniques and handling characteristics of four-wheel drives in different terrain
- differences between optional four-wheel drive and constant four-wheel drive vehicles and their impacts on vehicle operation and capability
- tyre management principles
- hazards associated with vehicle recovery, including:
 - slopes
 - pot holes
 - power lines
 - wet, slippery conditions
 - mud
 - changes in terrain
 - obstacles such as tree branches or poles
- travelling in convoy
- area restrictions
- knowledge of basic four wheel drive maintenance procedures, including:
 - charging batteries
 - changing fuses and globes
 - jump-starting
 - battery safety

Assessment Conditions

- Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors; and industry regulations for certification and licensing; and,
- this unit must be assessed in the context of this sector's work environment; and,
- this unit must be assessed in compliance with relevant legislation/regulation and using policies, procedures, processes and operational manuals directly related to the industry sector for which it is being assessed; and,
- assessment may be conducted in conjunction with the assessment of other units of competency; and,

- assessment must confirm consistent performance can be applied in a range of relevant workplace circumstances; and,
- assessors must demonstrate the performance evidence, and knowledge evidence as outlined in this unit of competency, and through the minimum years of current* work experience specified below in an industry sector relevant to the outcomes of the unit; or,
- where the assessor does not meet experience requirements a co-assessment or partnership arrangement must exist between the qualified assessor and an industry subject matter expert. The industry subject matter expert should hold the unit being assessed (or an equivalent unit) and/or demonstrate equivalence of skills and knowledge at the unit level. An industry technical expert must also demonstrate skills and knowledge from the minimum years of current work experience specified below in the industry sector, including time spent in roles related to the unit being assessed; and,
- assessor and Industry subject matter expert requirements differ depending on the Australian Qualifications Framework Level (AQF) of the qualification being assessed and/or industry sector as follows:

| Industry sector | AQF** Level | Required assessor or industry subject matter expert experience |
|--|---|--|
| Drilling, Metalliferous Mining, Coal Mining, Extractive (Quarrying) and Civil Construction | 1 | 1 Year |
| | 2 | 2 Years |
| Drilling, Coal Mining and Extractive (Quarrying) | 3-6 | 3 Years |
| Metalliferous Mining and Civil Construction | 3-6 | 5 Years |
| Other sectors | Where this unit is being assessed outside of the Resources and Infrastructure Sectors, assessor and/or industry subject matter expert experience should be in-line with industry standards for the sector in which it is being assessed and, where no industry standard is specified, should comply with any relevant regulation. | |

*Assessors can demonstrate current work experience through employment within industry in a role relevant to the outcomes of the unit; or, for external assessors this can be demonstrated through exposure to industry by conducting frequent site assessments across various locations.

**Where a unit is being delivered outside of a qualification the first numeric character in the unit code should be considered to indicate the AQF level.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272>

RIIWHS202D Enter and work in confined spaces

Modification History

| Release | Comment |
|---------|---|
| 1 | The unit replaces RIIOHS202A Enter and work in confined spaces. |
| 2 | Editorial corrections. |
| 3 | Amended Application field. |
| 4 | Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm. |

Application

This unit describes a participant's skills and knowledge required to enter and work in confined spaces in the Resources and Infrastructure Industries.

This unit is appropriate for those working in operational roles undertaking work in confined spaces.

Licensing, legislative, regulatory and certification requirements that apply to this unit can vary between states, territories, and Industry sectors. Relevant information must be sourced prior to application of the unit.

Note: The terms Occupational Health and Safety (OHS) and Work Health and Safety (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the National Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

Elements and Performance Criteria

| | |
|--|---|
| 1 Plan and prepare for working in confined space | <p>1.1 Access, interpret and apply procedures for confined space entry and the environmental management plan and ensure the work activity is compliant</p> <p>1.2 Obtain, confirm, clarify and apply work instructions and agreed procedure</p> <p>1.3 Obtain, confirm, clarify and apply safety requirements</p> |
|--|---|

| | |
|--------------------------|---|
| | <p>1.4 Obtain and confirm authorisation (entry permit) meets regulatory requirements</p> <p>1.5 Confirm the emergency response procedure is with the stand-by person and understood</p> <p>1.6 Identify, obtain and implement signage and barrier requirements</p> <p>1.7 Select tools and equipment for the tasks, check for serviceability and rectify or report any faults</p> <p>1.8 Identify, confirm and apply the environmental protection requirements</p> <p>1.9 Position rescue equipment by the entry permit</p> |
| 2 Work in confined space | <p>2.1 Gain access to confined space</p> <p>2.2 Ensure that the atmosphere is tested and monitored for harmful elements</p> <p>2.3 Correctly apply tagging and lock-out procedures</p> <p>2.4 Enter the confined space correctly</p> <p>2.5 Maintain ongoing communication with the stand-by person</p> <p>2.6 Comply with entry permit requirements</p> <p>2.7 Monitor and adhere to allocated entry time</p> |
| 3 Exit confined space | <p>3.1 Exit confined space correctly</p> <p>3.2 Recover tools, equipment and materials</p> <p>3.3 Conduct inspection of the confined space</p> <p>3.4 Secure access to the confined space</p> <p>3.5 Remove tagging and lock-out</p> <p>3.6 Accurately complete confined space entry permit</p> |
| 4 Clean up | <p>4.1 Clear work area and dispose of or recycle materials</p> <p>4.2 Clean, check, maintain and store tools and equipment</p> <p>4.3 Remove, clean and store barriers and signs</p> |

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit. Further information is available in the Resources and Infrastructure Industry Training Package Companion Volume.

Unit Mapping Information

RIIOHS202A Entering and working in confined spaces

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272>

Assessment Requirements for RIIWHS202D Enter and work in confined spaces

Modification History

| Release | Comment |
|---------|---|
| 1 | The unit replaces RIIOHS202A Enter and work in confined spaces. |
| 2 | Editorial corrections. |
| 3 | Amended Application field. |
| 4 | Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm. |

Performance Evidence

Evidence is required to be collected that demonstrates a candidate's competency in this unit. Evidence must be relevant to the roles within this sector's work operations and satisfy all of the requirements of the performance criteria of this unit and include evidence that the candidate:

- locates and applies relevant documentation, policies and procedures
- demonstrates completion of entering and working in confined spaces that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
 - obtain appropriate entry permit and instructions for performing work in confined space
 - interpreting and applying safe work method statements
 - apply tagging and lock out
 - selecting, wearing and caring for personal protective equipment applicable to all tasks and environment identified
 - entering the confined space
 - using atmospheric monitoring devices prior to entering the confined space
 - working in the confined space
 - using atmospheric monitoring devices during confined space activity
 - applying safe materials handling methods
 - exiting the confined space
 - remove tagging and lock out

Knowledge Evidence

The candidate must demonstrate knowledge of enter and work in confined spaces through:

- identifying areas that constitute confined spaces
- complying with site and equipment safety requirements
- complying with the entry and exit procedures, risks and regulations
- types of air contaminants and toxic gases
- identifying the limitations of breathing apparatus
- identifying equipment types, characteristics, technical capabilities and limitations
- complying with site isolation and site control responsibilities and authorities
- locations of safety data sheets (SDS) information and application
- using confined space and Industry terminology

Assessment Conditions

- An assessor of this unit must satisfy the requirements of the NVR/AQTF or their successors; and Industry regulations for certification and licensing; and,
- this unit is best assessed in the context of this sector's work environment;
- where personal safety or environmental damage are limiting factors, assessment may occur in a simulated environment provided it is realistic and sufficiently rigorous to cover all aspects of this sector's workplace performance, including environment, task skills, task management skills, contingency management skills and job role environment skills; and,
- this unit must be assessed in compliance with relevant legislation/regulation and using policies, procedures, processes and operational manuals directly related to the industry sector for which it is being assessed; and,
- assessment may be conducted in conjunction with the assessment of other Units of Competency; and,
- assessment must confirm consistent performance can be applied in a range of relevant workplace circumstances; and,
- assessors must demonstrate the performance evidence, and knowledge evidence as outlined in this Unit of Competency, and through the minimum years of current* work experience specified below in an Industry sector relevant to the outcomes of the unit; or,
- where the assessor does not meet experience requirements a co-assessment or partnership arrangement must exist between the qualified assessor and an Industry subject matter expert. The Industry subject matter expert should hold the unit being assessed (or an equivalent unit) and/or demonstrate equivalence of skills and knowledge at the unit level. An Industry technical expert must also demonstrate skills and knowledge from the minimum years of current work experience specified below in the Industry sector, including time spent in roles related to the unit being assessed; and,
- assessor and Industry subject matter expert requirements differ depending on the Australian Qualifications Framework Level (AQF) of the qualification being assessed and/or Industry Sector as follows:

| Industry sector | AQF** Level | Required assessor or Industry subject matter expert experience |
|--|--|--|
| Drilling, Metalliferous Mining, Coal Mining, Extractive (Quarrying) and Civil Construction | 1 | 1 Year |
| | 2 | 2 Years |
| Drilling, Coal Mining and Extractive (Quarrying) | 3-6 | 3 Years |
| Metalliferous Mining and Civil Construction | 3-6 | 5 Years |
| Other sectors | Where this Unit is being assessed outside of the Resources and Infrastructure Sectors assessor and/or Industry subject matter expert experience should be in-line with industry standards for the sector in which it is being assessed and where no Industry standard is specified should comply with any relevant regulation. | |

*Assessors can demonstrate current work experience through employment within Industry in a role relevant to the outcomes of the Unit; or, for external assessors this can be demonstrated through exposure to Industry by conducting frequent site assessments across various locations.

**Where a unit is being delivered outside of a Qualification the first numeric character in the Unit code should be considered to indicate the AQF level

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272>

RIIWHS204D Work safely at heights

Modification History

| Release | Comments |
|---------|---|
| 1 | This unit replaces RIIOHS204A Work safely at heights. |
| 2 | Formatting corrections. |
| 3 | Inserted Application information. |
| 4 | Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm. |

Application

This unit describes a participant's skills and knowledge required to work safely at heights in the Resources and Infrastructure Industries.

This unit is appropriate for those working in operational roles where they are required to perform work at heights.

Licensing, legislative, regulatory and certification requirements that apply to this unit can vary between states, territories, and Industry sectors. Relevant information must be sourced prior to application of the unit.

Note: The terms Occupational Health and Safety (OHS) and Work Health and Safety (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the National Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

Elements and Performance Criteria

| | |
|-------------------------------|--|
| 1. Identify work requirements | <p>1.1 Access, interpret and apply height safety procedures and ensure the work activity is compliant</p> <p>1.2 Inspect site to determine layout and physical condition, condition of structures, prevailing weather conditions, equipment requirements and potential hazards</p> <p>1.3 Adhere to WHS requirements</p> |
|-------------------------------|--|

| | |
|--|---|
| | <p>1.4 Identify, select and check safety equipment for serviceability</p> <p>1.5 Identify, manage and report potential risks and hazards</p> |
| 2. Identify work procedures and instructions | <p>2.1 Consult with authorised personnel to select materials, tools and equipment and check for serviceability</p> <p>2.2 Select, wear and care for personal protective equipment</p> <p>2.3 Inspect/install fall protection and perimeter protection equipment</p> <p>2.4 Identify approved methods of moving tools and equipment to work area and minimise potential hazards associated with tools at heights</p> <p>2.5 Ensure safety system has been installed correctly</p> <p>2.6 Select and install appropriate signs and barricades</p> |
| 3. Access and install equipment | <p>3.1 Consult with authorised personnel to ensure anchor fall protection and associated equipment is correctly fitted and adjusted</p> <p>3.2 Ensure all required equipment is installed</p> <p>3.3 Use recommended methods to access work area for people, tools and equipment</p> <p>3.4 Locate tools and materials to eliminate or minimise the risk of items being knocked down</p> |
| 4. Perform work at heights | <p>4.1 Check access from ground to work area and ensure it is safe</p> <p>4.2 Keep fall equipment in place and adjusted appropriately for movement during work</p> <p>4.3 Undertake manual handling of materials and equipment</p> <p>4.4 Locate materials and equipment ensuring that they are safely secured and distributed</p> <p>4.5 Check safety system periodically for compliance</p> <p>4.6 Monitor risk control measures to ensure that they are effective and appropriate</p> <p>4.7 Reassess risk control measures, as required, in accordance with changed work practices and/or site conditions and undertake alterations</p> |
| 5. Clean up work area | <p>5.1 Consult with authorised personnel to ensure safety system is dismantled and removed</p> <p>5.2 Clear work area and dispose of or recycle materials</p> <p>5.3 Clean, check, maintain and store tools and equipment</p> |

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit. Further information is available in the Resources and Infrastructure Industry Training Package Companion Volume.

Unit Mapping Information

RIIOHS204A Working safely at heights

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272>

Assessment Requirements for RIIWHS204D Work safely at heights

Modification History

| Release | Comments |
|---------|---|
| 1 | This unit replaces RIIOHS204A Work safely at heights. |
| 2 | Formatting corrections. |
| 3 | Inserted Application information. |
| 4 | Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm. |

Performance Evidence

Evidence is required to be collected that demonstrates a candidate's competency in this unit. Evidence must be relevant to the roles within this sector's work operations and satisfy all of the requirements of the performance criteria of this unit and include evidence that the candidate:

- locates and applies relevant documentation, policies and procedures
- demonstrates completion of working safely at heights that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
 - accessing, interpreting and applying technical and safety information for working at heights
 - assessing hazards and risk associated with working at heights and implement control methods
 - selecting wearing and caring for personal protective equipment
 - identifying required safety systems including fall protection and associated equipment
 - checking that fitting, adjusting and anchoring of fall protection and associated equipment is correct
 - performing work safely at heights

Knowledge Evidence

The candidate must demonstrate knowledge of the following when working safely at heights:

- names and functions of equipment, components and materials

- complying with equipment manufacturer's instructions and specifications
- safe shifting and handling of tools and materials
- adhering to statutory and regulatory authority requirements
- the nature of work undertaken at heights
- complying with heights safety systems
- the processes of providing for safe working practices
- using safety equipment/systems and considerations to facilitate working safely at heights
- complying with safe work methods

Assessment Conditions

- An assessor of this unit must satisfy the requirements of the NVR/AQTF or their successors; and Industry regulations for certification and licensing; and,
- this unit is best assessed in the context of this sector's work environment;
- where personal safety or environmental damage are limiting factors, assessment may occur in a simulated environment provided it is realistic and sufficiently rigorous to cover all aspects of this sector's workplace performance, including environment, task skills, task management skills, contingency management skills and job role environment skills; and,
- this unit must be assessed in compliance with relevant legislation/regulation and using policies, procedures, processes and operational manuals directly related to the industry sector for which it is being assessed; and,
- assessment may be conducted in conjunction with the assessment of other Units of Competency; and,
- assessment must confirm consistent performance can be applied in a range of relevant workplace circumstances; and,
- assessors must demonstrate the performance evidence, and knowledge evidence as outlined in this Unit of Competency, and through the minimum years of current* work experience specified below in an Industry sector relevant to the outcomes of the unit; or,
- where the assessor does not meet experience requirements a co-assessment or partnership arrangement must exist between the qualified assessor and an Industry subject matter expert. The Industry subject matter expert should hold the unit being assessed (or an equivalent unit) and/or demonstrate equivalence of skills and knowledge at the unit level. An Industry technical expert must also demonstrate skills and knowledge from the minimum years of current work experience specified below in the Industry sector, including time spent in roles related to the unit being assessed; and,
- assessor and Industry subject matter expert requirements differ depending on the Australian Qualifications Framework Level (AQF) of the qualification being assessed and/or Industry Sector as follows:

| Industry sector | AQF** Level | Required assessor or Industry subject matter expert experience |
|--|-------------|--|
| Drilling, Metalliferous Mining, Coal Mining, Extractive (Quarrying) and Civil Construction | 1 | 1 Year |
| | 2 | 2 Years |

| | | |
|--|--|---------|
| Drilling, Coal Mining and Extractive (Quarrying) | 3-6 | 3 Years |
| Metalliferous Mining and Civil Construction | 3-6 | 5 Years |
| Other sectors | Where this Unit is being assessed outside of the Resources and Infrastructure Sectors assessor and/or Industry subject matter expert experience should be in-line with industry standards for the sector in which it is being assessed and where no Industry standard is specified should comply with any relevant regulation. | |

*Assessors can demonstrate current work experience through employment within Industry in a role relevant to the outcomes of the Unit; or, for external assessors this can be demonstrated through exposure to Industry by conducting frequent site assessments across various locations.

**Where a unit is being delivered outside of a Qualification the first numeric character in the Unit code should be considered to indicate the AQF level

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272>

RIIWHS403D Apply the mine work health and safety management plan

Modification History

| Release | Comment |
|---------|---|
| 1 | The unit replaces RIIOHS403A Apply the mine occupational health and safety management plan. |
| 2 | Editorial corrections. Amended Application field. |
| 3 | Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm. |

Application

This unit describes a participant's skills and knowledge required to apply the mine work health and safety management plan within Coal and Metalliferous mining.

This unit is appropriate for those working in supervisory roles where risk needs to be managed.

Licensing, legislative, regulatory and certification requirements that apply to this unit can vary between states, territories, and Industry sectors. Relevant information must be sourced prior to application of the unit.

Note: The terms Occupational Health and Safety (OHS) and Work Health and Safety (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the National Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

Elements and Performance Criteria

| | |
|--|--|
| 1. Identify and interpret the requirements of the Work Health and Safety Management Plan | 1.1 Access, interpret and apply the Mine Work Health and Safety Management Plan and ensure the work activity is compliant 1.2 Access, interpret and clarify the Work Health and Safety Management Plan 1.3 Identify, clarify and communicate roles, responsibilities and |
|--|--|

| | |
|--|--|
| | <p>tasks to others</p> <p>1.4 Identify, obtain and allocate resources and equipment required for the application of the Work Health and Safety Management Plan</p> <p>1.5 Identify individual training needs</p> <p>1.6 Identify, report and review the major hazards, and review established procedures</p> <p>1.7 Determine appropriate controls for hazards and develop risk control measures</p> <p>1.8 Identify potential safety, health or hygiene risks</p> |
| 2. Apply Work Health and Safety Management Plan | <p>2.1 Determine requirements of the Work Health and Safety Management Plan</p> <p>2.2 Assess and communicate the nature and scope of the incidents</p> <p>2.3 Prepare an action plan in consultation with others to maintain health and safety</p> <p>2.4 Apply and monitor health and safety plans and procedures</p> <p>2.5 Apply procedures for monitoring, recording and reporting on hazards</p> |
| 3. Monitor effectiveness of WHS control measures | <p>3.1 Monitor the application of health and safety procedures and control measures</p> <p>3.2 Monitor the activities of others in relation to any major hazards</p> <p>3.3 Monitor the use, effectiveness and appropriateness of safety procedures including adequate personal protective equipment, systems and measures</p> <p>3.4 Monitor systems and procedures for manual and assisted handling</p> <p>3.5 Monitor the health aspects relevant to work activities and requirements</p> <p>3.6 Monitor adequacy of control measures and revise where necessary</p> <p>3.7 Action or recommend changes to improve the health and safety aspects of the job</p> <p>3.8 Investigate and report any accident or near miss</p> <p>3.9 Maintain written WHS records of work injury, incidents, health and hygiene issues</p> <p>3.10 Report verbally and in writing WHS issues which need resolving by others</p> |

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit. Further information is available in the Resources and Infrastructure Industry Training Package Companion Volume.

Unit Mapping Information

RIIOHS403A Apply the mine occupational health and safety management plan

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272>

Assessment Requirements for RIIWHS403D Apply the mine work health and safety management plan

Modification History

| Release | Comment |
|---------|---|
| 1 | The unit replaces RIIOHS403A Apply the mine occupational health and safety management plan. |
| 2 | Editorial corrections. Amended Application field. |
| 3 | Required frequency and volume of evidence amended in Performance evidence. Substantial amendments made in Assessment Conditions field, including: references to Industry Sectors, assessor and subject matter expert experience requirements, how assessment should be conducted and what it should confirm. |

Performance Evidence

Evidence is required to be collected that demonstrates a candidate's competency in this unit. Evidence must be relevant to the roles within this sector's work operations and satisfy all of the requirements of the performance criteria of this unit and include evidence that the candidate:

- locates and applies relevant legislation, documentation, policies and procedures
- demonstrates completion of the application of the mine work health and safety management plan that safely, effectively and efficiently meets all of the required outcomes on more than one (1) occasion including:
 - providing clear and timely instruction and supervision of those involved in applying the mine Work Health and Safety Management Plan
 - identifying and reporting on risks
 - evaluating hazards and reviewing procedures to eliminate or manage hazards
 - determining health & hygiene training needs of site personnel
 - writing an action plan to maintain site health and safety that specifies resources and plans to control established hazards
 - organising activities on site to support the plan requirement
 - applying and monitoring mine site procedures and systems
 - conducting enquiries/investigations and preparing written reports of outcomes
 - recording of injury, incidents and health and hygiene issues

- accessing, evaluating and applying data from monitoring systems and equipment / plant
- reviewing and auditing site processes and techniques

Knowledge Evidence

The candidate must demonstrate knowledge of the following when applying the mine Work Health and Safety Management Plan:

- relevant legislative and industry WHS standards and compliance requirements
- relevant work processes
- health and hygiene standards
- isolation of plant and equipment techniques
- hazard identification and risk management
- observation and inspection methods
- impacts of drug and substance abuse on fitness for work
- relevant mine hazards associated with:
 - hazardous substances, dusts, noise, vibration
 - the mining processes
 - explosives (where used)
 - high-wall/low-wall failure and water ingress
 - mining equipment and haul roads
- emergency procedure planning and preparation
- conventional signage use

Assessment Conditions

- An assessor of this unit must satisfy the requirements of the NVR/AQTF or their successors; and Industry regulations for certification and licensing; and,
- this unit is best assessed in the context of this sector's work environment;
- where personal safety or environmental damage are limiting factors, assessment may occur in a simulated environment provided it is realistic and sufficiently rigorous to cover all aspects of this sector's workplace performance, including environment, task skills, task management skills, contingency management skills and job role environment skills; and,
- this unit must be assessed in compliance with relevant legislation/regulation and using policies, procedures, processes and operational manuals directly related to the industry sector for which it is being assessed; and,
- assessment may be conducted in conjunction with the assessment of other Units of Competency; and,
- assessment must confirm consistent performance can be applied in a range of relevant workplace circumstances; and,
- assessors must demonstrate the performance evidence, and knowledge evidence as outlined in this Unit of Competency, and through the minimum years of current* work experience specified below in an Industry sector relevant to the outcomes of the unit; or,

- where the assessor does not meet experience requirements a co-assessment or partnership arrangement must exist between the qualified assessor and an Industry subject matter expert. The Industry subject matter expert should hold the unit being assessed (or an equivalent unit) and/or demonstrate equivalence of skills and knowledge at the unit level. An Industry technical expert must also demonstrate skills and knowledge from the minimum years of current work experience specified below in the Industry sector, including time spent in roles related to the unit being assessed; and,
- assessor and Industry subject matter expert requirements differ depending on the Australian Qualifications Framework Level (AQF) of the qualification being assessed and/or Industry Sector as follows:

| Industry sector | AQF** Level | Required assessor or Industry subject matter expert experience |
|--|--|--|
| Drilling, Metalliferous Mining, Coal Mining, Extractive (Quarrying) and Civil Construction | 1 | 1 Year |
| | 2 | 2 Years |
| Drilling, Coal Mining and Extractive (Quarrying) | 3-6 | 3 Years |
| Metalliferous Mining and Civil Construction | 3-6 | 5 Years |
| Other sectors | Where this Unit is being assessed outside of the Resources and Infrastructure Sectors assessor and/or Industry subject matter expert experience should be in-line with industry standards for the sector in which it is being assessed and where no Industry standard is specified should comply with any relevant regulation. | |

*Assessors can demonstrate current work experience through employment within Industry in a role relevant to the outcomes of the Unit; or, for external assessors this can be demonstrated through exposure to Industry by conducting frequent site assessments across various locations.

**Where a unit is being delivered outside of a Qualification the first numeric character in the Unit code should be considered to indicate the AQF level

Links

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=88a61002-9a21-4386-aaf8-69c76e675272>

SIRXCEG002 Assist with customer difficulties

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to solve customer problems and use techniques to deal with customer difficulties.

It applies to individuals working in frontline customer service roles in a diverse range of industry sectors and business contexts. They operate with independence and under limited supervision and guidance from others, and within established organisational policies and procedures.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Customer Engagement

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes

1. Deal with customer complaints.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Recognise customer dissatisfaction and take action to avoid escalation.
- 1.2. Follow organisational policies and procedures to respond to customer complaints according to own level of responsibility and

- seek solutions in consultation with the customer.
- 1.3.Refer complex and escalated customer complaints to relevant personnel.
 - 1.4.Maintain a positive and cooperative manner during all customer interactions.
 - 1.5.Report on customer complaints following organisational procedures.
 2. Process refunds and exchanges.
 - 2.1.Identify reasons for refunds and exchanges, and offer a replacement or alternative product to maximise sales opportunities.
 - 2.2.Process refunds and exchanges and record details according to organisational policies and procedures.
 3. Deal with difficult customers.
 - 3.1.Identify difficult or abusive customers and take swift and tactful action to prevent escalation of problem.
 - 3.2.Identify situations where personal safety of self, customers or team members may be threatened, and seek appropriate assistance.
 4. Provide feedback on customer service.
 - 4.1.Identify consistent and potential customer difficulties and report to relevant personnel for action to prevent future customer dissatisfaction.
 - 4.2.Offer suggestions and solutions to relevant personnel for improved customer experiences.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

Oral communication skills to:

- ask open and closed questions and actively listen to determine and meet customer preferences.

Self-management skills to:

- manage personal emotions in difficult situations.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXCEG002 Assist with customer difficulties

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- follow organisational policies and procedures to appropriately respond to four customer difficulties that individually or cumulatively involve:
 - customer complaint
 - dissatisfied customer
 - product or service issue
 - product or service refunds
- demonstrate the appropriate steps for responding to two of the following difficult customers:
 - customers that are unable to be pacified
 - customer displaying verbal aggression
 - customer displaying threatening behaviour
 - drug or alcohol affected customer.
 -

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- organisational policies and procedures for:
 - processing refunds and exchanges
 - resolving customer complaints
 - recording customer complaints
 - dealing with difficult customers:
 - customers that are unable to be pacified
 - customer displaying verbal aggression
 - customer displaying threatening behaviour
 - drug or alcohol affected customer
 - escalated customer complaints
- techniques for:

- identifying customer dissatisfaction
- preventing escalation of customer complaints
- resolving complaints to maintain brand integrity
- communicating with dissatisfied customers
- commercial impacts of:
 - cost of refunds and exchanges
 - loss to business resulting from customer dissatisfaction
 - negative word of mouth
- value and role of customer feedback in improving service delivery
- key aspects of consumer protection laws relevant to the selling of products and services:
 - organisational responsibilities and rights
 - customer rights
 - refunds and exchanges
- common causes of customer difficulties.

Assessment Conditions

Skills must be demonstrated in a services industry environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- relevant documentation:
 - organisational policies and procedures for:
 - processing refunds and exchanges
 - resolving customer complaints
 - recording customer complaints
 - dealing with difficult customers:
 - customers that are unable to be pacified
 - customer displaying verbal aggression
 - customer displaying threatening behaviour
 - drug or alcohol affected customer
 - escalated customer complaints
 - current plain English regulatory documents distributed by government regulators outlining key aspects of consumer protection laws
- customers with whom the individual can interact; these can be:
 - individuals in an industry workplace, or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment

- assessment activities that allow the individual to work with commercial speed, timing and productivity.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXCEG004 Create a customer-centric culture

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to manage and ensure the delivery of customer service standards and work with team members to improve customer experiences.

It applies to individuals working in customer service management roles in a diverse range of industry sectors and business contexts. They operate independently with some responsibility for others and decision making, and within established organisational policies and procedures.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Customer Engagement

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Promote a customer focused culture.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1.Ensure team understanding of and commitment to providing quality customer service and enhancing the customer's experience.
- 1.2.Promote customer service standards within the team and

- encourage ownership over delivery of service standards.
- 1.3. Act as a positive role model displaying customer centric behaviours and consistently delivering on customer service standards.
2. Foster the customer culture.
- 2.1. Ensure adequate team resourcing to ensure delivery on customer service standards.
- 2.2. Monitor customer service and take action when standards are not met.
- 2.3. Provide feedback to team on their ability to meet customer service standards.
- 2.4. Provide coaching to team members to enhance customer service delivery.
3. Monitor and adjust customer service.
- 3.1. Seek feedback from team and customers on customer service standards.
- 3.2. Review customer trends and demands and seek opportunities to enhance customer experience based on findings.
- 3.3. Develop and document customer service improvement plans in consultation with the team.

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXCEG004 Create a customer-centric culture

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- monitor and review customer service standards, on three different occasions, and document a plan to improve customer service standards based on observations
- demonstrate the following approaches to promoting a customer-centric culture:
 - role-modelling customer service standards
 - observing standard of customer service delivery
 - coaching team members towards improvement
 - identifying and rectifying customer service delivery issues.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- principles of quality customer service:
 - customer expectations
 - enhancing customer experience
- techniques for:
 - coaching others
 - providing performance feedback
 - seeking feedback
 - monitoring and reviewing customer services standards
 - improving customer service standards
- organisational customer services standards:
 - professional service standards
 - designated response times
 - customer service procedures
 - resources required to deliver on customer service standards
- commercial impact of:
 - quality customer service
 - poor customer service

- positive and negative customer reviews
- value and role of customer feedback in improving service delivery.

Assessment Conditions

Skills must be demonstrated in a services industry environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- organisational customer service standards:
 - professional service standards
 - designated response times
 - customer service procedures
 - resources required to deliver on customer service standards
- team members and customers; these can be:
 - individuals in an industry workplace, or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXCEG005 Maintain business to business relationships

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to develop and maintain relationships with business customers by identifying customer needs and improving outcomes.

It applies to individuals working in customer service roles in a diverse range of wholesale businesses. They operate with independence and under limited supervision and guidance from others, and within established organisational policies and procedures.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Customer Engagement

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Maintain contact with business customers.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Confirm relevant contact personnel for each business or account customer.
- 1.2. Document and maintain currency of contact details.
- 1.3. Participate in, and contribute to, team activities to

- provide services to business customers.
- 1.4. Identify and build external relationships to improve supply chain efficiency.
 - 1.5. Maintain business customer contact according to organisational policies and procedures.
2. Identify business customer needs.
 - 2.1. Confirm the mechanisms to identify business customer needs.
 - 2.2. Consult relevant customer contacts to review their business needs.
 - 2.3. Review current business and promotional activities, and determine future needs for individual customers.
 - 2.4. Outline and confirm trading terms for specific business customers.
 - 2.5. Confirm and apply organisational pricing policies and procedures.
 - 2.6. Process information about business using the latest forecasts of current and future trends.
 3. Improve business customer outcomes and business relationships.
 - 3.1. Report, promote and advocate for the needs of business customers and end consumers within the organisation.
 - 3.2. Identify and use quality assurance and compliance procedures to qualify and quantify business customer needs.
 - 3.3. Identify and discuss ideas about improving sales service and performance with colleagues and customers
 - 3.4. Ensure the standards of quality required to meet business customer service needs and expectations are met.
 - 3.5. Recognise deficiencies in service provided to business customers and rectify to customer satisfaction in line with own level of responsibility.
 - 3.6. Anticipate future needs of business customers and plan and document activities accordingly.
 - 3.7. Provide regular, effective and targeted feedback to business customers regarding services and the value that is provided.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

Technology skills to:

- source information about current and future trends.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXCEG005 Maintain business to business relationships

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- build sustainable relationships with two business customers, and for each customer:
 - identify specific needs
 - determine options to meet needs
 - select and use communication strategies suited to the customer
 - confirm trading terms according to organisational policies and procedures.
 - develop and document activities for improved customer outcomes and relationship.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- organisational policies and procedures for:
 - building relationships with business customers
 - pricing
- factors that impact business to business relationships
- interpersonal communication techniques that facilitate:
 - building sustainable relationships with business customers
 - consultation on needs
 - negotiation
 - presentation
- sources of information on:
 - product and supply arrangements for customers
 - current and future trends
- different types of promotional activities and their features in a business to business context
- factors that impact trading terms:
 - continuous improvement
 - due diligence requirements
 - infrastructure and capital outlay requirements
 - intellectual property and technology rights

- market position
- organisational systems integration and compatibility
- planning cycles and timing
- risk sharing
- supply chain management
- agreed terms and conditions
- key aspects of legislation that impact sales work in a business-to-business context including Australian Consumer Law.

Assessment Conditions

Skills must be demonstrated in a services industry environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- sources of product information
- organisational policies and procedures for:
 - building relationships with business customers
 - pricing
- forecasts for current and future market trends
- business customers with different requirements; these can be:
 - individuals in an industry workplace, or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXECM002 Prepare digital content

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to prepare written and visual digital content for use across online platforms and ecommerce sites. It requires the ability to determine content requirements, create content that aligns with both organisational and customer needs, and complete content uploading.

It applies to individuals working in operational roles in a diverse range of businesses that operate online to sell products and services. They operate with some independence, under limited supervision and guidance from others, and within established organisational policies and procedures.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Ecommerce

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Determine digital

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

1.1. Determine organisational written and visual digital content

content needs.

needs.

1.2. Access and review organisational templates and content style guides to inform content development and ensure content consistency.

1.3. Identify platform functionality and limitations to inform content development.

1.4. Determine use of content across internal and external platforms to inform content development and allow ease of use across multiple platforms.

1.5. Access product and organisational information required for content development.

1.6. Plan content development that aligns with organisational branding and marketing activity.

2. Develop written content.

2.1. Develop written content that aligns with organisational style guide, branding and marketing activity.

2.2. Produce accurate and detailed written content that aids customer browsing and purchasing.

2.3. Use text styling that provides a clear hierarchy of content.

2.4. Use copywriting techniques that encourage customer engagement.

2.5. Plan and use keywords for search engine optimisation.

2.6. Check for correct use of grammar and spelling and make any required amendments.

2.7. Seek feedback from relevant personnel and make any required amendments to written content.

3. Develop visual content.

3.1. Source visual content that connects with the target market and aligns with organisational style guide, branding and marketing activity.

3.2. Edit visual content to generate high quality and appealing visual content.

3.3. Ensure visual content accurately represents products and services.

3.4. Seek feedback from relevant personnel and make any required amendments to visual content.

4. Upload digital content.

4.1. Gain approval for written and visual content.

4.2. Upload content to digital platforms using approved file extension scheme.

4.3. Arrange content in a logical design for improved user

experience.

4.4. Ensure content is displayed in a visually appealing manner.

4.5. Seek input of relevant personnel to ensure accuracy and relevance of written and visual content.

4.6. View the content in closed contention mode, test on multiple devices, and make any required amendments.

4.7. Archive content and ensure version control is applied to track content history.

4.8. Ensure content is securely stored and backed up.

Foundation Skills

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

Technology skills to:

- upload images, text files, PDF files, audio files and video files and link associated files
- import and export software functions
- edit and format written and visual content.

Unit Mapping Information

No equivalent unit

Links

Companion Volume Implementation Guides -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXECM002 Prepare digital content

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- follow an organisational content style guide to develop the following types of written and visual content for use across two different digital platforms:
 - product descriptions
 - videos
 - still images
 - purchasing information
 - promotional content
- develop the above written and digital content to:
 - meet platform functionality requirements
 - create target market appeal
 - achieve consistency with organisational branding and promotional activity
- upload and test the above digital content on two different devices.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- key legal and ethical considerations as related to digital content development:
 - Trade Practices Act
 - Privacy Act
- role of digital content in an online environment
- techniques for using digital content to:
 - engage customers
 - maximise sales
 - generate traffic
 - create brand and target market appeal
 - achieve consistency and alignment with organisational branding and promotional activity
- current trends in digital content development and use

- current software used to aid digital content development
- site design and functionality and its relationship to digital content development
- role of templates and style guides in digital content development
- role and use of copywriting in digital content development
- role and use of search engine optimisation in digital content development
- techniques for creating written and visual online content relevant to different target markets
- techniques to achieve:
 - clarity
 - ease of viewing and navigation
 - visual appeal
 - readability
- use and features of:
 - keywords
 - styling
 - file schemes
- information architecture and its relationship to digital content
- tools and techniques for uploading and storing digital content.

Assessment Conditions

Skills must be demonstrated in a service industries environment. This can be:

- an industry workplace
- a simulated industry environment

Assessment must ensure access to:

- relevant documentation:
 - organisational content style guide
 - digital content templates
- digital platforms for content uploading
- software for use in digital content development
- information technology hardware and software.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume Implementation Guides -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXECM003 Design an ecommerce site

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to design the interface of an ecommerce site. It requires the ability to determine the needs of an ecommerce site, develop designs that enhance usability and appearance, and review site functionality.

This unit applies to individuals working in a diverse range of sectors and business contexts. They operate independently, under limited supervision from others, and are responsible for making a range of operational decisions.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Ecommerce

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Determine ecommerce site requirements.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

1.1. Identify required features, capabilities and functionality of an ecommerce site.

1.2. Identify best practice site design and use benchmarking to

- inform ecommerce site design.
- 1.3. Identify opportunities for the integration of existing systems and procedures.
 - 1.4. Investigate design and technology options available to maximise site usability and functionality.
2. Design a user centred interface.
- 2.1. Obtain and review organisational style guide to inform site design.
 - 2.2. Design site map and wire frame to create optimal user experience, functionality and product exposure.
 - 2.3. Select metadata that allows for search engine optimisation.
 - 2.4. Plan for ecommerce functionality and optimisation across multiple devices.
 - 2.5. Ensure consistency of design with organisational style requirements and make any required amendments.
 - 2.6. Seek feedback from relevant personnel and make amendments to site design based on feedback.
 - 2.7. Communicate site designs to web and content developers.
 - 2.8. Adjust designs based on recommendations from web and content developers.
3. Review site usability.
- 3.1. Test interface to ensure functionality across multiple devices and make adjustments to improve functionality.
 - 3.2. Review site navigation and usability and make adjustments to usability.
 - 3.3. Perform testing and amend written content based on results.
 - 3.4. Continuously monitor site usability and make any required updates.

Foundation Skills

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

- | | |
|-----------------------|--|
| Reading skills to: | <ul style="list-style-type: none"> interpret technical and complex ecommerce terminology. |
| Technology skills to: | <ul style="list-style-type: none"> navigate ecommerce platform control panels. |

Unit Mapping Information

No equivalent unit

Links

Companion Volume Implementation Guides -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXECM003 Design an ecommerce site

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- document and design an interface for one ecommerce site that details:
 - site map
 - site architecture
 - wire frame
 - navigation
 - filtering
 - search functionality
 - shopping cart and payment gateways
 - optimisation across multiple devices
 - integration with existing systems and platforms
 - content requirements
 - branding requirements
 - communication and contact information
 - compliance with legal requirements
 - security requirements
 - platform capacity
- undertake site testing to review and report on site functionality of one ecommerce site.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- key aspects of ecommerce design:
 - site map
 - site architecture
 - wire frame
 - navigation
 - menu structure
 - filtering

- optimisation across multiple devices
- content requirements
- search functionality
- integration with social media and customer relationship management (CRM)
- integration with existing systems
- shopping cart and payment gateways
- security considerations
- retail and product branding requirements
- communication aspects
- legal requirements
- customisation considerations
- industry best practice in ecommerce design
- types of testing and role in ecommerce design
- common site development terminology related to ecommerce site design and usability
- interface specifications for ecommerce and their role in improved site usability
- customer buying preferences and how they impact site design
- design features to achieve usability and functionality
- site navigation structures and their features, benefits and limitations
- factors impacting ease of operation of a site:
 - navigation
 - site download time
 - time to download files
 - link accuracy
 - search functionality
- relationships between content and site design
- importance and application of consistency in content styling and design
- role of data analytics in informing website design
- website customer purchase flows and their significance in ecommerce
- methods for tracking and reporting on purchase flows
- role of an organisational content style guide in designing ecommerce sites.

Assessment Conditions

Skills must be demonstrated in a service industries environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- relevant documentation:
 - organisational policies and procedures related to site design

- organisational content style guide
- site performance data
- ecommerce sites for testing and review.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume Implementation Guides -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXMGT005 Lead the development of business opportunities

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to identify, analyse and implement programs that will provide opportunities for business growth.

This unit applies to senior personnel working in a diverse range of sectors and business contexts. They operate independently and are responsible for making a range of operational business decisions and strategic planning.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Management and Leadership

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Identify new business opportunities.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Review existing operations to identify and analyse new business opportunities.
- 1.2. Research business trends relevant to the organisation to identify new business opportunities.
- 1.3. Identify and evaluate opportunities and threats from internal

- and external environments.
- 1.4.Consult with stakeholders and customers to seek input into business opportunities.
 - 1.5.Determine organisational capacity to respond to identified opportunities and select opportunities to peruse.
 2. Develop a business development plan.
 - 2.1.Prepare feasibility studies and reports that assess viability, profitability and sustainability of development opportunities.
 - 2.2.Analyse risks associated with initiatives and ensure compliance with legislative and regulatory requirements.
 - 2.3.Develop and document a business development plan outlining priorities, responsibilities, performance indicators, timelines and budgets.
 - 2.4.Communicate plans to relevant personnel and seek required approval.
 - 2.5.Test business development initiatives for acceptance in the market place.
 - 2.6.Prioritise potential business development opportunities for action.
 3. Implement business development plan.
 - 3.1.Communicate the business develop plan to relevant stakeholders and personnel.
 - 3.2.Allocate resources to support the delivery of business development opportunities.
 - 3.3.Oversee the roll-out of marketing and communication processes to target markets launching new business initiatives.
 4. Evaluate impact of business development plans.
 - 4.1.Monitor and evaluate new business initiatives against desired outcomes and performance indicators.
 - 4.2.Review business development plans in line with changing organisational and business requirements.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

- | | |
|------------------------|---|
| Writing skills to: | • prepare complex business documents. |
| Numeracy skills to: | • analyse financial viability of new opportunities. |
| Problem solving skills | • exercise judgement and decision making when selecting opportunities for business development. |

to:

Initiative and enterprise skills to: • apply lateral and creative thinking to the development of new opportunities.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXMG T005 Lead the development of business opportunities

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- identify business opportunities and develop a business development plan for the implementation of one identified opportunity by:
 - researching and analysing internal and external business environments to determine opportunities for business development
 - determining feasibility of and risks associated with business development opportunities
 - developing business plan that details:
 - priorities
 - responsibilities
 - performance indicators
 - timelines
 - budgets
 - evaluating the above plan against performance indicators and report on impact and effectiveness.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- techniques for:
 - identifying and analysing business opportunities
 - determining feasibility of business development opportunities
 - evaluating business development plans
- formats of business development plans
- internal and external environments and their role in determining business opportunities
- risks associated with business development opportunities and strategies to minimise risks
- budgeting and financial planning procedures
- business development opportunities and trends in the relevant industry.

Assessment Conditions

Skills must be demonstrated in a services industry environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- sources of information on internal and external operating environments
- stakeholders with whom the individual can interact; these can be:
 - individuals in an industry workplace, or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXMKT001 Support marketing and promotional activities

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to support the implementation of marketing and promotional activities.

It applies to individuals working in frontline sales roles in a diverse range of industry sectors and business contexts. They operate with some independence under general supervision and guidance from others, and within established organisational policies and procedures.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-requisite Unit

Nil

Competency Field

Marketing

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Confirm promotional and marketing activities.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Access information regarding upcoming marketing and promotional activities including objectives, resourcing and timing.
- 1.2. Confirm own role and responsibilities in supporting marketing and promotional activities and seek clarification

- as required.
2. Communicate promotional and marketing activities.
 - 2.1. Communicate details of marketing and promotional programs to team members and customers as required.
 - 2.2. Promote marketing and promotional activities to customers providing accurate information and details.
 - 2.3. Respond to customer enquiries regarding marketing and promotional activities and refer complex enquiries to relevant personnel.
 3. Support marketing and promotional programs.
 - 3.1. Access and display marketing and promotional signage and materials as required.
 - 3.2. Maintain marketing and promotional signage and materials.
 - 3.3. Act on opportunities to enhance outcomes of marketing and promotional activities.
 - 3.4. Ensure adequate resourcing to achieve marketing and promotional objectives.
 - 3.5. Refer marketing and promotional issues to relevant personnel as required.

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXMKT001 Support marketing and promotional activities

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- support the implementation of one marketing or promotional activity by:
 - accessing organisational marketing plan and determining activity requirements and own responsibilities
 - displaying and maintaining activity resourcing and materials
 - communicating activities to customers.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- organisational policies and procedures for the implementation of marketing and promotional activities as relevant to own role
- promotional and marketing resourcing
- techniques for supporting the achievement of marketing and promotional objectives
- techniques for communicating and promoting marketing and promotional activities to customers.

Assessment Conditions

Skills must be demonstrated in a retail environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- organisational policies and procedures for the implementation of marketing and promotional activities as relevant to own role
- marketing or promotional plans.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXMKT002 Use social media to engage customers

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to manage the use of social media platforms to interact with customers and promote products and services.

It applies to individuals working in customer service management roles in a diverse range of industry sectors and business contexts that have a social media presence. They operate independently with some responsibility for decision making, and within established organisational policies and procedures.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Marketing

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Prepare to use social media.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Review organisational social media requirements and policies and procedures.
- 1.2. Research various social media platforms, and identify and compare their audience, functionality and reach.

- 1.3. Research emerging trends in social media platform use.
- 1.4. Select social media platforms that meet brand needs and reach target customer.
- 1.5. Source information and content from internal and external sources for use on social media platforms
- 1.6. Develop content in line with target audience, brand cultures and social media requirements as required.
- 1.7. Source or create a social media calendar.
2. Use social media to enhance customer engagement.
 - 2.1. Create opportunities to attract and promote user-generated content.
 - 2.2. Respond to customers in a timely manner, directing them to relevant information as required.
 - 2.3. Identify potential brand damage, and take action to prevent escalation.
 - 2.4. Promptly respond to customer complaints and issues according to social media policies and procedures.
 - 2.5. Adhere to legal and ethical practices for social media use.
3. Promote products and services.
 - 3.1. Identify social media marketing opportunities and curate and post content to promote products and services.
 - 3.2. Use social media to promote special offers, events and promotions as required.
 - 3.3. Post content according to social media policies and procedures.
4. Review social media use.
 - 4.1. Track social media activity using monitoring tools.
 - 4.2. Identify opportunities to improve customer experience, and recommend to relevant personnel.
 - 4.3. Update the look and feel of the social media account to maximise effectiveness.
 - 4.4. Report on social media engagement and reach to relevant personnel.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

- Reading skills to:
- interpret technical terminology relevant to the use of social media platforms.

- Writing skills to:
- use correct spelling and grammar in social media posts.
- Technology skills to:
- upload images, text files, PDF files, audio files, video files and link associated files
 - import and export software functions
 - conduct online research for appropriate content
 - compare social media platform functionality.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXMKT002 Use social media to engage customers

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- research four social media platforms and select two platforms for use, appropriate to business needs and target customer
- use the above two social media platforms to engage the customer by:
 - curating and posting written and visual content appropriate to the target customer
 - promote one organisational marketing activity
 - respond to two of the following types of customer social media posts:
 - customer reviews
 - user generated content
 - questions
 - complaints
 - troll
- review effectiveness of social media platform across a one month period by:
 - reporting on social media activity
 - making at least one recommendation for continuous improvement of social media use.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- organisational policies and procedures for social media use
- rules and regulations and terms of use of specific social media platforms:
 - privacy
 - spamming
 - copyright
 - creative commons
- social media trends:
 - trending platforms
 - consumer behaviour
 - trending content

- various social media platforms:
 - demographic of primary users
 - key features and uses
 - integration into business activity
 - useability
 - privacy and security features
 - costs
- legal and ethical practices for use of social media:
 - responsible use of platforms
 - responsible marketing practices
 - fair competition guidelines
 - duty of care
 - bullying and harassment policy
- types of social media users and their impacts:
 - troll
 - angry customer
 - misguided customer
 - unhappy customer
 - complimentary customers
 - brand advocates
- techniques for:
 - marketing the business using social media platforms:
 - promoting products
 - promoting special events
 - creating brand awareness
 - responding to customer posts on social media:
 - customer reviews
 - user generated content
 - questions
 - complaints
 - troll
- social media tools, and their use, for:
 - monitoring
 - scheduling social media content
 - capturing engagement and reach data
- commercial impact of social media platform both favourable and unfavourable:
 - importance of consumer reviews and user generated content
 - value of building a community of advocates on a social media platform
 - types of crisis issues or conflicts that can arise on social media locally, nationally and internationally

- sources and types of social media content:
 - product information
 - images and photos
 - links to other websites
 - videos
 - text and graphics
 - current trends
 - Internet.

Assessment Conditions

Skills must be demonstrated in:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- relevant documentation:
 - organisational policies and procedures for social media use
 - legal and ethical use of social media
- social media content calendar that details:
 - key events and promotions
 - milestones and relevant dates
 - content for release
- files for use across social media platforms:
 - image files
 - text files
 - PDF files
 - audio files
 - video files
 - link associated files
- computer or mobile device with Internet access
- social media monitoring tools
- social media platforms
- customer postings on social media platforms
- assessment activities that allow the individual to work with commercial speed, timing and productivity.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXMKT006 Develop a social media strategy

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to plan and evaluate the use of social media. It requires the ability to determine suitable social media platforms, plan appropriate use and evaluate the effectiveness of social media activity.

This unit applies to individuals working in a diverse range of sectors and business contexts. They operate independently, under limited supervision from others, and are responsible for making a range of operational decisions.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Marketing

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Determine social media requirements.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

1.1. Review organisational strategic objectives and determine objectives and priorities for social media use.

1.2. Source and analyse information about the target market, its

- social media use, behaviours and preferred platforms.
- 1.3. Identify and analyse emerging trends in social media platform use.
 - 1.4. Review and compare social media platforms and select those that meet organisational and target market needs.
 - 1.5. Identify opportunities for social media integration with existing systems and procedures.
 - 1.6. Identify opportunities to maximise business exposure through social media activity.
 - 1.7. Determine opportunities for building brand awareness and an online community through social media use.
2. Develop social media policies and procedures.
- 2.1. Establish scope of social media policies and procedures based on planned social media activity.
 - 2.2. Establish guidelines for social media engagement and content use.
 - 2.3. Develop issue and crisis management guidelines and appropriate responses.
 - 2.4. Integrate legal and ethical considerations into social media policies and procedures.
 - 2.5. Ensure policies and procedures are customer-focused and align with organisational marketing plan and strategy.
3. Develop social media strategy.
- 3.1. Determine strategies for social media content development, customer engagement and customer service.
 - 3.2. Develop and document a social media action plan detailing key responsibilities, resourcing requirements and timeframes.
 - 3.3. Prepare a social media calendar documenting planned social media activity in line with marketing strategy and promotional activities.
 - 3.4. Establish key performance indicators and evaluation criteria for measuring success of social media activity.
 - 3.5. Establish methods for tracking and analysing social media engagement, activity and reach.
 - 3.6. Ensure social media strategy aligns with organisational objectives and customer service standards.
4. Monitor social media use.
- 4.1. Communicate social media strategy, action plan, calendar and policies and procedures with relevant personnel.
 - 4.2. Monitor social media issues and crisis management and take required action to ensure impacts are minimised and occurrence of future issues or crisis are minimised.

- 4.3. Ensure tracking of social media engagement, activity and reach.
- 4.4. Monitor posting of social media content and ensure alignment with social media strategy, policies and procedures.
- 5. Review social media performance.
 - 5.1. Analyse captured data to determine social media engagement, activity and reach.
 - 5.2. Evaluate social media activity against strategy and use performance indicators to evaluate success of social media use.
 - 5.3. Identify opportunities for future improvements in social media use and modify strategy and plans accordingly.

Foundation Skills

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria, are listed here, along with a brief context statement.

| SKILLS | DESCRIPTION |
|-----------------------|---|
| Reading skills to: | <ul style="list-style-type: none">interpret social media technical and key terminologyinterpret complex and potentially unfamiliar information sources related to social media use |
| Numeracy skills to: | <ul style="list-style-type: none">interpret and analyse social media activity reports. |
| Technology skills to: | <ul style="list-style-type: none">use technologies and devices that support social media platforms. |

Unit Mapping Information

No equivalent unit.

Links

Companion Volume Implementation Guides -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXMKT006 Develop a social media strategy

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- research and compare at least three different social media platforms for organisational use and select platforms that best meet organisational social media requirements
- for each platform identify:
 - key features
 - benefits
 - limitations
 - functionality
 - target audience and key users
 - terms of use
- develop organisational policies and procedures for social media use detailing:
 - appropriate use of social media
 - appropriate content use and posting
 - complaints handling and crisis management
 - meeting legal and ethical responsibilities
 - privacy and security
- develop a social media strategy for execution over a three-month period that details:
 - calendar of activities
 - resourcing requirements
 - content strategy
 - engagement strategy
 - activity and engagement tracking
 - key performance indicators and evaluation criteria
- monitor and review social media data to review social media performance over a one month-period and make recommendations for future improvements.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- key legal and ethical considerations as relevant to social media use:
 - Australian Consumer Law
 - copyright
 - privacy
 - codes of practice
 - data and personal security
- trends in social media use and role in:
 - consumer engagement and feedback
 - generating sales
 - promotions and marketing
 - branding
- social media platforms:
 - key features
 - benefits
 - limitations
 - functionality
 - target audience and key users
 - terms of use
- key contents of organisational social media policies and procedures:
 - appropriate use of social media
 - appropriate content use and posting
 - complaints handling and crisis management
 - meeting legal and ethical responsibilities
 - privacy and security
- techniques for achieving the following through social media use:
 - customer engagement
 - brand awareness
 - brand advocacy
 - increased sales
 - improved reach
- role and benefits of user-generated content
- role and key inclusions of a social media strategy:
 - calendar of activities
 - resourcing requirements
 - content strategy
 - engagement strategy
 - activity and engagement tracking
 - key performance indicators and evaluation criteria
 - action plan
- tools and methods for tracking social media activity

- types of social media issues and crisis:
 - potential impact
 - management strategies.

Assessment Conditions

Skills must be demonstrated in a service industries environment. This can be:

- an industry workplace
- a simulated industry workplace.

Assessment must ensure use of:

- information technology hardware and software
- online information systems
- social media platforms
- social media usage and activity reports.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume Implementation Guides -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXMKT007 Develop a digital marketing plan

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to research, plan, implement and evaluate digital marketing activities.

This unit applies to individuals working in a diverse range of sectors and business contexts. They operate independently, under limited supervision from others, and are responsible for making a range of operational decisions.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Marketing

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Determine digital marketing requirements.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

1.1. Determine organisational objectives and priorities for digital marketing activity.

1.2. Confirm available budget for digital marketing activity.

- 1.3. Review information on current and past digital marketing activities and their effectiveness.
 - 1.4. Segment the online market and define target market.
 - 1.5. Research target market and identify suitable digital marketing activities.
 - 1.6. Identify internal and external factors impacting digital marketing activities.
 - 1.7. Research trends and best practice in digital marketing, tools and software available.
2. Develop digital marketing plan.
- 2.1. Confirm and document digital marketing objectives that are consistent with organisational objectives and priorities.
 - 2.2. Determine digital marketing activities to drive targeted traffic to site and generate sales.
 - 2.3. Document a digital marketing action plan that details key activities, resources and timeframes.
 - 2.4. Establish performance indicators and evaluation criteria for measuring impact of digital marketing activities.
 - 2.5. Integrate legal and ethical requirements and considerations into planning.
 - 2.6. Ensure digital marketing plan aligns with organisational objectives, current marketing strategy and budget.
 - 2.7. Seek required approval for digital marketing plan.
3. Monitor digital marketing activity.
- 3.1. Communicate digital marketing plan, responsibilities and expectations to relevant personnel.
 - 3.2. Oversee digital marketing activity and respond to issues as they arise.
 - 3.3. Monitor digital marketing content and ensure alignment with digital marketing plans and objectives.
 - 3.4. Track customer traffic and conversion rates to identify trends in customer and digital marketing activity.
4. Review digital marketing activities.
- 4.1. Review trends in customer traffic and conversion rates to determine impact of digital marketing activities.
 - 4.2. Calculate return on investment for any paid digital marketing activities.
 - 4.3. Identify and evaluate new and emerging digital marketing trends and technologies and consider their use for improved marketing outcomes.
 - 4.4. Make recommendations for improvements in digital

marketing based on review.

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume Implementation Guides -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXMKT007 Develop a digital marketing plan

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- determine the digital marketing requirements of one organisation and develop a digital marketing plan, to be executed over one sales or promotional period, detailing:
 - digital marketing channels
 - priorities
 - key activities
 - responsibilities
 - performance indicators
 - tracking
 - timelines
 - budgets
- review digital marketing activity across one sales or promotional period to:
 - determine effectiveness of activities
 - make recommendations for improvements.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- key legal and ethical requirements and considerations as relevant to digital marketing:
 - Australian Consumer Law
 - copyright
 - privacy
 - codes of practice
- current digital marketing trends and technologies
- customer behaviours and psychology as related to digital marketing
- traditional and non-traditional digital marketing types and channels:
 - search engine optimisation
 - search engine marketing
 - online advertising

- email
- video
- blogging
- social media
- affiliate marketing
- impressions
- remarketing
- the above list of marketing types and channels and their:
 - benefits
 - limitations
 - application and use
- internal and external operating factors impacting digital marketing
- techniques for market segmentation and its application to digital marketing
- techniques and tools for achieving the following through digital marketing activities:
 - increased customer traffic
 - increased engagement:
 - existing customers
 - new customers
 - disengaged customers
 - sales generation
 - consistency in content
 - consistency with marketing strategy
- digital marketing planning techniques and formats, and key features of a digital marketing plan
- performance indicators for measuring impact of digital marketing activities
- tools and methods for tracking digital marketing activity.

Assessment Conditions

Skills must be demonstrated in a service industries environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- current information on digital marketing types and channels
- digital marketing monitoring tools.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume Implementation Guides -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXOSM003 Use social media and online tools

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to implement the use of social media and online platforms for organisational purposes. It requires the ability to identify the objectives for online communications, create and post relevant content to promote engagement with the organisation, and to engage professionally with customers.

It applies to individuals who work at an operational level. They use discretion and judgement to take responsibility for work outcomes but actions are guided by plans, policies and procedures, supervisors and managers. Although an operational function, it can apply to small business owner operators who are responsible for a range of functions.

This unit applies to self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms

Competency Field

Online and Social Media

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

PERFORMANCE CRITERIA

Elements describe the essential outcomes

Performance criteria describe the performance needed to demonstrate achievement of the element.

1. Determine organisational

1.1. Access and interpret predetermined strategies and

- and communication requirements.
2. Prepare content.
3. Utilise platform functions.
4. Promote engagement with organisation.
5. Monitor sites and engage professionally with customers.
- plans to guide activities.
- 1.2. Identify target audience and organisational objectives for social media or online communication.
- 1.3. Select social media and online platforms suited to communication objectives and target audience.
- 1.4. Access or create schedule of types and frequency of social media and online communications.
- 2.1. Source and select organisational and external information to create content relevant to purpose.
- 2.2. Use language, style and tone suited to organisational image and target audience.
- 2.3. Check content for accuracy, currency and relevance for purpose.
- 2.4. Develop and format content in line with organisational guidelines.
- 2.5. Obtain required approvals before publication.
- 3.1. Utilise functions and templates provided by social media and online platforms to create posts.
- 3.2. Upload file types suited to communication requirements.
- 3.3. Create active links to organisational and external sites.
- 4.1. Curate and post content regularly or according to planned organisational schedule.
- 4.2. Create opportunities to attract user generated content.
- 4.3. Use posts during targeted campaigns.
- 5.1. Monitor customer activity according to organisational schedule.
- 5.2. Communicate with customers in a timely, professional and positive manner to enhance organisational reputation.
- 5.3. Respond to negative comments and complaints sensitively, courteously and respectfully according to organisational policies and procedures.
- 5.4. Refer customer negative feedback to relevant personnel according to organisational policies and procedures.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

| SKILLS | DESCRIPTION |
|--------------------------------------|--|
| Reading skills to: | <ul style="list-style-type: none">• interpret detailed familiar organisational guidelines, policies and procedures• interpret and use relevant content from organisation documents of varying complexity. |
| Writing skills to: | <ul style="list-style-type: none">• create accurate and engaging content using language suitable for purpose and audience |
| Initiative and enterprise skills to: | <ul style="list-style-type: none">• identify opportunities to engage customers and promote exposure of the organisation through online activities. |
| Planning and organising skills to: | <ul style="list-style-type: none">• use plans and schedules to guide work activities and meet deadlines. |

Unit Mapping Information

No equivalent unit.

Links

Companion Volume Implementation Guide -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXOSM003 Use social media and online tools

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- utilise three different types of social media or online platforms for organisational communications
- create and post content for six different communications and collectively use at least three different types of media files
- create and post content for a further two communications for a targeted social media or online campaign and determine links that could be used to external sites
- monitor customer engagement with posts and respond professionally to customer communications covering:
 - two positive comments
 - two negative comments
 - two questions
 - two complaints
- respond to two issues of complaint or negativity that require escalation to relevant personnel.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- organisation's core activities and customer base
- different organisational purposes for use of social media and online platforms:
 - exposure through social media activity
 - building brand awareness, loyalty and an online community
 - marketing and advertising
 - information dissemination
 - promoting special offers and events
- popularity of different categories and reach of particular brands of social media platforms and their key audiences
- organisational guidelines, policies and procedures for:
 - content

- online customer service including complaints resolution
- privacy
- gaining consent to publish information about others and their images
- monitoring customer activity
- characteristics of well written, appealing content for different social media platforms
- functions of different social media and online platforms and how to use these to:
 - write and format text
 - upload different file types including text, PDF, photographs, videos, audio files
 - create active links
 - monitor customer activity
 - activate and respond to alerts
 - respond to customer commentary
- principles of positive and professional online communications that enhance customer engagement and organisational reputation
- types of positive language and approaches that can be used when dealing with negativity, complaints and conflicts
- types of standard customer responses and when these might be used.

Assessment Conditions

This unit has been written to allow for application to any type of industry. Assessment must be customised according to the industry context of learners while ensuring that all skill and knowledge content is assessed, and all performance evidence is collected.

This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms appropriate for their industry during assessment.

Assessment must ensure use of:

- real workplace situations, or simulated activities, or case study scenarios that test aspects of this unit that involve customer and supervisor communication
- computers or mobile devices and general software programs used to produce and schedule content
- a range of social media and online platforms with access to functions used by organisations; these can be those used by a workplace or those established by a training organisation for the purpose of assessment
- sample organisational guidelines, policies and procedures for:
 - content
 - online customer service including complaints resolution
 - privacy
 - gaining consent to publish information about and images of others
 - monitoring customer activity.

Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.

Links

Companion Volume Implementation Guide -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXOSM005 Develop a basic website for customer engagement

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to plan and build a basic website suited to organisation purposes and customer requirements. It requires the ability to plan and develop both the structure and content for the site, and to test and evaluate the site before it goes live.

It covers those skills needed by an organisation that chooses to develop its own site, using website building platforms, rather than using the services of information technology specialists.

It applies to individuals who work independently or with limited guidance from others, including senior operational personnel, business unit managers and, particularly to small business owner operators.

This unit applies to self-employed individuals, and owners and employees of any type of organisation including commercial, not-for-profit and government organisations.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Online and Social Media

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

1. Plan website structure.
 - 1.1. Determine website purpose, structure and style to suit target customer audience requirements.
 - 1.2. Identify required functions, capabilities and security requirements which meet website purpose.
 - 1.3. Determine need for interactive forms and functions to capture customer information and maximise customer interaction.
 - 1.4. Plan layout and navigation flow for appearance, readability, links and ease of use.
 - 1.5. Document structure to facilitate efficient development.
 - 1.6. Research and select website building software applications and hosting services based on website requirements.
 - 1.7. Identify current and future website functionality, and compatibility of software applications to ensure add-ons can be achieved.
2. Develop website content.
 - 2.1 Select and evaluate information to create relevant website content consistent with organisational policy for information that can be publicly shared
 - 2.2 Design interactive forms and user functionality to capture required information.
 - 2.1. Create and utilise a list of key words to promote and ensure search engine optimisation.
 - 2.2. Use language, style and tone suited to organisational brand, image and target audience.
 - 2.3. Select non-text content features to complement website text.
 - 2.4. Check content for accuracy, currency and relevance.
3. Create website pages.
 - 3.1. Utilise functions and templates provided by website building software to create pages and effective navigation.
 - 3.2. Select page titles and key words that reflect purpose and can be easily understood by audience.
 - 3.3. Utilise key words throughout site to maximise traffic to website and targeted content.
 - 3.4. Incorporate non-text content features to enhance page presentation.
 - 3.5. Create interactive forms and functions to capture customer information and maximise interaction.
 - 3.6. Develop linked webpages and ensure links are clearly named and unambiguous.
 - 3.7. Use consistent design features across all pages for ease of readability and navigation.

4. Test and critically evaluate website before site goes live.
- 3.8. Upload files to web hosting service according to technical requirements.
- 4.1. Test all website functions and navigation to confirm operational status and ease of use.
- 4.2. Test useability of interactive forms and functions.
- 4.3. Check accuracy of content and evaluate design for appeal and match to organisation image.
- 4.4. Run test searches to ensure key words are driving traffic to the site and targeted content.
- 4.5. Adjust content, design, key words and navigation flow to ensure website is fit for purpose and meets organisation image requirements.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

| SKILLS | DESCRIPTION |
|------------------------------------|--|
| Reading skills to: | <ul style="list-style-type: none"> interpret unfamiliar jargon and directions of different complexity found website platform building software interpret the intent of and extract relevant content from organisational documents. |
| Writing skills to: | <ul style="list-style-type: none"> produce cohesive website content using clear and detailed language suitable for purpose and audience create content of online forms to elicit the required information using relevant headings and questions in a logical sequence. |
| Planning and organising skills to: | <ul style="list-style-type: none"> coordinate multiple elements involved in developing a website in a logical and time efficient sequence. |
| Self-management skills to: | <ul style="list-style-type: none"> critically evaluate own work to improve website content and functionality take responsibility for development of website from information collection through to evaluation before site goes live. |

Unit Mapping Information

No equivalent unit.

Links

Companion Volume Implementation Guide -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXOSM005 Develop a basic website for customer engagement

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- plan for and build one basic website, to the point of publication, suited to identified purpose and customer requirements
- integrate at least three of the following functions into the website structure:
 - search facility
 - interactive fillable forms
 - uploading and downloading information
 - active links to other sites
 - links to drive navigation to featured content
 - chat facilities for provision of information
 - facilities for customer feedback, testimonials and commentary on content
 - security of customer and organisational information
- utilise at least four of the following design features into the website to create appeal and ease of readability and access:
 - coloured frames and banners
 - different fonts and colours for headings and text
 - lists using numbers and bullet points
 - images
 - videos
 - animations
 - sound files
 - tables, graphs or charts
- test all functions and links built into the website on two different devices before the site goes live
- evaluate content, design and useability, for two different devices, and identify three areas of potential change to be considered before the site goes live.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- role of a website in the communications or marketing mix for particular types of organisations
- common functions provided by basic websites and how these can be effectively used for different organisational purposes:
 - search facility
 - interactive fillable forms
 - uploading and downloading information
 - active links to other sites including social media pages
 - chat facilities for provision of information
 - facilities for customer feedback, testimonials and commentary on content
 - security of:
 - customer private and financial information including through password protection
 - images and information owned by website operator
 - collection of data on traffic and user interaction with site
- a range of website building software providers including website functionality provided, advantages and disadvantages, and associated costs
- compatibility issues that can occur between different types of website building software applications
- types of available templates including how to access and build into a website
- how interactive fillable forms work and how information collected is provided to the website operator
- features of effective website layout and navigation flow
- functions that can be used to drive navigation to featured content and external web pages:
 - highlighted, coloured and underlined words
 - pop up messages
 - hyperlink text and tags in hypertext markup language (HTML)
- general principles for effective website design and how the following design features can be used to create appeal, ease of readability and access:
 - consistency across pages
 - coloured frames and banners
 - headings
 - different fonts and colours
 - lists using numbers and bullet points
 - images, videos, animations and sound files
 - tables, graphs and charts
 - navigation tabs with simple directive language relevant to purpose
- how to make web content more accessible to people with disability and they key content of published accessibility guidelines
- techniques for manipulating digital images and graphics, and their insertion into a website
- principles of search engine optimisation (SEO) and how traffic is driven to websites through use of:
 - key words and density on the page

- organic searches
- features of browsers, search engines and web crawlers, and how they impact on website design, decisions and meta-tags
- how web hosting services operate, a range of services offered by providers and associated costs
- how to obtain and register a domain name and what services are generally included as part of registration
- methods used to test newly developed websites, prior to site going live, and logical sequence of testing.

Assessment Conditions

This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms appropriate for their industry during assessment.

Learners can develop a website for actual organisational use or one for the purposes of assessment.

Assessment must ensure use of:

- computers and mobile devices for the development and testing of website
- website building software applications.

Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.

Links

Companion Volume Implementation Guide -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXOSM007 Manage risk to organisational reputation in an online setting

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to develop and implement processes for managing risks to an organisation's reputation associated with social media and online engagement, including the impacts of online negative commentary, complaints and criticism.

It requires the ability to develop a social media crisis management plan and other processes to monitor and respond to issues and incidents.

It applies to individuals who work at a senior level who operate independently, can have responsibility for others and are responsible for making a range of operational and strategic decisions.

This unit applies to self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Online and Social Media

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

PERFORMANCE CRITERIA

Elements describe the essential *Performance criteria describe the performance needed to*

*outcomes**demonstrate achievement of the element.*

- | | |
|---|---|
| <ol style="list-style-type: none"> 1. Identify risks to organisational reputation and plan control measures. 2. Establish processes for monitoring customer commentary, feedback and criticism. 3. Develop policies and procedures for response. 4. Manage organisational reputation. | <ol style="list-style-type: none"> 1.1. Identify risks to organisational reputation associated with social media and online presence, including any security risks. 1.2. Develop social media and online crisis management plan to deal with damaging issues and incidents. 2.1. Determine a schedule for monitoring organisation's social media and online sites and external review pages. 2.2. Allocate responsibility to personnel or external providers for consistently and regularly monitoring sites. 2.3. Register organisation for alerts provided by social media and review platforms. 2.4. Establish a schedule for analysing online performance using analytics tools. 3.1. Establish standards for use of appropriate language and tone for responding to both positive and negative comments. 3.2. Develop standard responses that can be used for common circumstances. 3.3. Designate response times in policies and procedures. 4.1. Take responsibility for resolution of complex and difficult customer interactions. 4.2. Utilise functions provided by social media and review platforms to manage persistent and damaging interactions. 4.3. Assess performance reports regularly to identify systematic communication issues and implement improvements. 4.4. Assess escalating issues and implement crisis management processes to minimise impacts. |
|---|---|

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

Reading skills to:

- interpret the intent and extract relevant content of customer opinions expressed with differing levels of clarity.

- Writing skills to:
- produce comprehensive plans, policies and procedures using clear and detailed language that can be easily understood by personnel operating at different levels of seniority
 - produce customer responses of varying complexity, using language suitable for purpose and audience.
- Numeracy skills to:
- interpret fundamental statistical information from performance reports to draw conclusions.
- Self-management skills to:
- critically analyse issues and incidents to determine appropriate individual and systematic responses.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume Implementation Guide -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXOSM007 Manage risk to organisational reputation in an online setting

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- for a particular organisation, identify significant risks to reputation and develop one social media and online crisis management plan to deal with potential damaging issues and incidents
- develop and communicate written policies and procedures covering all of the following issues:
 - schedule for monitoring social media and online, and external review pages
 - schedule for analysing and assessing online performance data
 - designated response times for customer compliments, complaints, negative commentary and bad reviews
 - standard responses that can be used for common circumstances, including holding responses
 - guidelines on the use of appropriate language for responding to positive and negative comments
 - issues that should be escalated and referred to managers
 - guidelines for removing comments, and reporting, blocking and banning users
- respond to customer communications covering:
 - two escalated complaints, giving consideration to previous organisational communications, and take measures to resolve
 - two bad reviews
- implement crisis management processes in response to one crisis, including allocation of responsibilities to personnel.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- common risks to an organisation's reputation in an online setting:
 - customer complaints in a public setting
 - bad reviews
 - untrue or highly exaggerated comments about a customer and organisation interaction

- criticism of organisation's brand, values, products or services
- commentary by others not involved but supporting complainants or showing bias
- comments that accuse organisation of illegal acts
- online personal communications of others associated with the organisation that are incompatible with organisation's brand values and image including: staff, contractors, suppliers, sponsors, donors etc.
- overt or implied criticism of the organisation by current or past personnel
- online attacks by activists deliberately targeting the organisation
- common security risks:
 - hacking of accounts
 - spam messages and content with dangerous links
 - threats to property, personnel and others associated with the organisation
- specific to the particular industry, types of reputational and security risks
- common formats and inclusions of policies and procedures
- for crisis management:
 - difference between a problem and a crisis and common crisis scenarios
 - format and common inclusions of social media crisis management plans
 - typical actions taken by organisations during a crisis response
 - roles typically allocated to personnel at different levels of seniority and to external providers
- analytics functions provided by social media and review platforms that can assist in identifying and managing risk to organisational reputation
- monitoring and alert functions provided by social media and review platforms and how these operate
- reasons to consistently monitor social media and review sites and common schedules
- types of monitoring services offered by external providers and benefits of engaging
- the importance of timely responses for:
 - managing complaints and negative reviews
 - answering enquiries to avoid complaints
 - compliments to ensure customer feels valued, not ignored and how responses can add value to reputation
- types of standard responses that can be provided and the role of a holding response
- organisational chain of command for responding to and managing:
 - compliments
 - complaints and criticism
 - crises
- reasons for and advantages of resolving complaints off line
- functions provided by social media and review platforms to manage persistent and damaging interactions, how these operate and factors to consider before implementing:
 - removal of comments
 - reporting

- blocking and banning users
- signs, stages and levels of conflict, and techniques used to resolve at various stages of escalation
- principles of positive and professional online communications that minimise risk to organisational reputation
- types of positive language and approaches that can be used when dealing with negativity, complaints and conflicts.

Assessment Conditions

This unit has been written to allow for application to any type of industry. Assessment must be customised according to the industry context of learners while ensuring that all skill and knowledge content is assessed, and all performance evidence is collected.

This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms appropriate for their industry during assessment.

Assessment must ensure use of:

- real workplace situations, or simulated activities, or case study scenarios that test aspects of this unit that involve customer and team communication
- computers and general software programs used to produce system documents and schedules
- a range of social media and online platforms with access to functions used by organisations including monitoring and alert functions; these can be those used by a workplace or established by a training organisation for the purposes of assessment
- analytics tools and reports provided by social media and online platforms.

Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.

Links

Companion Volume Implementation Guide -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXPDK001 Advise on products and services

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to develop product and service knowledge and provide information to customers.

This unit applies to individuals working in frontline customer service and sales roles in a diverse range of industry and business contexts. They operate with some independence under general supervision and guidance from others, and within established organisational policies and procedures.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Product Knowledge

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Develop product and service knowledge.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Identify and access sources of information on products and services.
- 1.2. Interpret information about availability, features and benefits of products and services.

- | | |
|----------------------------------|---|
| | 1.3.Compare products and services based on product information. |
| | 1.4.Identify and use opportunities to update knowledge for the product and service range. |
| 2. Respond to customer requests. | 2.1.Answer customer questions about products and services with current and accurate information. |
| | 2.2.Use questions to clarify customer information needs. |
| | 2.3.Explain product and service details using clear communication. |
| | 2.4.Source additional information when answer to customer request is unknown or refer to relevant colleagues. |
| 3. Enhance information provided. | 3.1.Identify situations where additional information may assist the customer. |
| | 3.2.Advise on alternative products or services that may meet customer needs when requested item is not available. |
| | 3.3.Recommend complementary products, specials, new lines and promotions to customers according to their needs. |

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

Numeracy skills to:

- interpret pricing information.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXPDK001 Advise on products and services

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- access and interpret sources of information on four different products or services
- respond to four different customer inquiries for product or service information that individually or cumulatively require provision of information on all of the following:
 - features and benefits
 - price
 - alternative products or services
 - complementary products or services.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- organisational policies and procedures for:
 - interactions with customers
 - product or service pricing
- basic key aspects of legislation that impact provision of information for the product or service range:
 - Australian Consumer Law
 - product or service specific legislation
- interpersonal communication techniques:
 - active listening and questioning
 - communication methods which convey information clearly and concisely
- product and service information for the product or service range:
 - features and benefits
 - price
 - care and handling of products
 - availability
 - storage requirements, shelf life and use by date
 - warranties

- ingredients or materials contained in product
- origins
- alternative products and services
- complementary products and services.

Assessment Conditions

Skills must be demonstrated in a services industries environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- a product or service range
- sources of product information
- relevant documentation:
 - current plain English regulatory documents distributed by government regulators outlining factors that impact provision of information for the product or service range
 - price lists
 - organisational policies and procedures relevant to product and service advice
- customers; these can be:
 - customers in an industry workplace, or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXSL003 Achieve sales results

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to drive the sales of products and services, and create a sales environment, to meet sales targets.

It applies to individuals working in frontline management roles in a diverse range of industry sectors and business contexts. They operate independently with some responsibility for others and decision making, and within established organisational policies and procedures.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Sales

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Identify sales targets.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Access and review sales targets.
- 1.2. Ensure sales targets are achievable and allow customer service standards to be maintained.
- 1.3. Review internal and external factors that may affect sales achievement and take measures to reduce impact.

- 1.4. Review past sales performance to inform achievement of sales targets.
 - 1.5. Determine sales strategies for achieving sales targets.
2. Create a sales environment.
 - 2.1. Set and communicate team and individual sales targets.
 - 2.2. Ensure availability of adequate resources to achieve sales targets.
 - 2.3. Support team to achieve sales targets and provide feedback on performance.
 - 2.4. Resolve or limit operational issues that hinder sales target achievement.
3. Review sales targets.
 - 3.1. Monitor achievement of sales targets, and provide feedback to team for ongoing improvement.
 - 3.2. Take corrective action when sales targets are not met.
 - 3.3. Report on sales target achievement in line with organisational reporting procedures.

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXSL003 Achieve sales results

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- monitor sales performance against sales targets over a designated organisational sales period by:
 - reviewing sales targets and determining strategies for achievement
 - communicating sales targets to team members
 - responding to the following situations:
 - sales targets consistently not achieved
 - sales targets achieved
 - internal factors impacting on sales
 - external factors impacting on sales.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- organisational policies and procedures for:
 - customer service
 - sales process
- internal factors impacting on sales:
 - lack of resources
 - stock issues
 - team lacking sales skills
- external factors impacting on sales:
 - competitor activity
 - operating environmental impacts
- strategies for:
 - interpreting sales targets
 - achieving sales targets
 - corrective action for response to poor performance
- sales processes and how they are used to achieve sales targets
- required action to improve sales when the following problems occur:

- operational issues
- lack of resources
- stock issues
- competitor activity.

Assessment Conditions

Skills must be demonstrated in a services industry environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- relevant documentation:
 - organisational policies and procedures for sales process and customer service standards
 - sales targets
 - records of previous sales
- team members; these can be:
 - individuals in an industry workplace, or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

SIRXSL004 Drive sales results

Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to develop and implement a plan to drive sales results in a retail marketplace.

This unit applies to senior personnel working in a diverse range of industry sectors and business contexts. They operate independently and are responsible for making a range of operational business decisions and the achievement of sales results.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Sales

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Review current operations.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Analyse external retail market place to determine factors impacting sales.
- 1.2. Obtain and review organisational sales strategy.
- 1.3. Review current sales targets and performance and contributing factors that impact sales.

- | | |
|--------------------------------------|---|
| | 1.4.Obtain feedback from existing customers on current product and service offerings. |
| | 1.5.Analyse information to inform plans to drive sales. |
| 2. Develop a plan to drive sales. | 2.1.Identify potential customer traffic generators to attract new customers. |
| | 2.2.Determine how to retain and develop repeat business from existing customers. |
| | 2.3.Consult relevant stakeholders for input into sales plan. |
| | 2.4.Develop a plan to grow sales from new and existing customers. |
| 3. Implement and monitor sales plan. | 3.1.Communicate plan to relevant personnel delegating key responsibilities. |
| | 3.2.Schedule activities and resources to drive sales. |
| | 3.3.Undertake planned sales activities and support sales teams in creating a selling environment. |
| | 3.4.Monitor plan against targets and adjust as required. |

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

| SKILLS | DESCRIPTION |
|-------------------------------|---|
| Reading skills to: | <ul style="list-style-type: none"> gather, interpret and analyse textual information from sources to identify information relevant to retail sales management. |
| Writing skills to: | <ul style="list-style-type: none"> prepare effective written communications to multiple stakeholders in line with organisational procedures. |
| Oral communication skills to: | <ul style="list-style-type: none"> consult multiple stakeholders using questioning and listening to elicit opinions, and to confirm and clarify comprehension. |
| Numeracy skills to: | <ul style="list-style-type: none"> assess sales results and use numerical data to inform plans. |
| Technology skills to: | <ul style="list-style-type: none"> use digital technologies and systems to access information, document plans and communicate with others. |

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRXSL004 Drive sales results

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- develop and implement a plan to retail drive sales that includes:
 - comprehensive overview of current operations:
 - sales process and selling environment
 - average spend and conversion rates
 - stock levels in relation to customer demand
 - customer feedback
 - trends in consumer behaviour
 - competitor activity
 - economic activity
 - organisational sales targets
 - traffic generators for new customers
 - tactics to retain existing customers
 - tactics to increase average spend and conversion rates
- monitor and review sales results against a sales plan for one sales period and identify areas for improved sales performance.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- key elements and features of a sales plan
- internal factors impacting on sales
- external factors impacting sales in the retail environment:
 - trends in consumer behaviour
 - competitor activity
 - economic activity
- role of customer feedback in growing sales
- customer traffic generators
- techniques for growing sales within the retail environment for:
 - new customers

- existing customers
- increasing average spend and conversion rates
- marketing activities and their role in sales:
 - promotions
 - social media campaigns
 - advertising campaigns.

Assessment Conditions

Skills must be demonstrated in a services industry environment. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- relevant business technology with internet capability
- organisational documentation:
 - sales strategy
 - sales performance records
 - sales targets
- sources of customer feedback.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

TAEASS301 Contribute to assessment

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with <i>TAE Training and Education Training Package Version 2.0</i> . |

Application

This unit describes the skills and knowledge required to contribute to the assessment process.

It applies to a person with technical or vocational expertise who is in a supervisory or mentoring/coaching work role, and for whom collecting the evidence for assessment is an adjunct to principal work responsibilities. The unit applies to those involved in collecting evidence for assessment against units of competency or accredited courses.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Assessment

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| 1. Clarify role and responsibilities in the assessment process | <p>1.1 Discuss and confirm the purpose of the assessment with relevant people</p> <p>1.2 Discuss and confirm benchmarks for assessment with the qualified assessor</p> <p>1.3 Access, read and clarify assessment plan with the qualified assessor</p> <p>1.4 Discuss and agree with the qualified assessor specific responsibilities in gathering evidence, and the types of evidence to be gathered</p> |
| 2. Confirm organisational arrangements for evidence gathering | <p>2.1 Access and confirm relevant assessment system policies and procedures, organisational, legal and ethical requirements, and other relevant advice on assessment</p> <p>2.2 Clarify the nominated assessment tools and methods for collecting evidence with the qualified assessor, to ensure that the procedures to be followed, and the instruments to be used are clear</p> <p>2.3 Discuss and confirm with the relevant people the assessment context, including the candidate's characteristics and any need for reasonable adjustments</p> <p>2.4 Confirm and arrange resource requirements in consultation with relevant people</p> |
| 3. Collect evidence in accordance with the assessment plan | <p>3.1 Explain the assessment process to the candidate, including the different responsibilities of the parties involved, and refer any candidate issues or concerns to the qualified assessor, prior to undertaking assessment activities</p> <p>3.2 Use assessment instruments to gather quality evidence within the available time and resources, according to organisational, legal and ethical requirements</p> |
| 4. Record and report findings | <p>4.1 Organise and provide evidence to the qualified assessor in a format suitable for analysis according to the assessment system's policies and procedures</p> <p>4.2 Actively seek feedback from the qualified assessor on whether evidence-gathering activities meet the principles of assessment, and whether the evidence collected meets the rules of evidence</p> <p>4.3 Document areas for improvement in collecting evidence for future assessment activities</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---|--|
| Learning | 4.2 | <ul style="list-style-type: none"> Seeks feedback to build knowledge to improve process and professional practice |
| Reading | 1.3, 2.1, 2.2, 2.4, 3.2 | <ul style="list-style-type: none"> Sources and interprets procedural, and compliance information |
| Writing | 1.1, 1.2, 1.3, 2.1, 2.3, 2.4, 3.2, 4.1, 4.3 | <ul style="list-style-type: none"> Completes workplace documentation accurately using the appropriate language |
| Oral Communication | 1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4, 3.1 | <ul style="list-style-type: none"> Communicates information and process requirements clearly, based on techniques appropriate to the audience and environment Uses appropriate speaking and listening techniques to obtain specific information, and to support the assessment process |
| Navigate the world of work | 2.1, 2.2, 3.2, 4.1 | <ul style="list-style-type: none"> Accesses, confirms and takes responsibility for adherence to policies, procedures, and legal and ethical requirements |
| Interact with others | 4.2 | <ul style="list-style-type: none"> Asks questions to clarify understanding, and seeks feedback and further information |
| Get the work done | 3.1, 4.1 | <ul style="list-style-type: none"> Organises work according to defined requirements, taking some responsibility for decisions regarding the format of information |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|------------------------------------|-------------------------------------|---|--------------------|
| TAEASS301 Contribute to assessment | TAEASS301B Contribute to assessment | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

Assessment Requirements for TAEASS301 Contribute to assessment

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with <i>TAE Training and Education Training Package Version 2.0</i> . |

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- clarifying the role to be taken during the assessment
- clarifying the assessment plan with the qualified assessor, including agreement about:
 - what evidence will be collected
 - how the evidence will be collected
- carrying out a minimum of three evidence-gathering activities and, on each occasion:
 - document evidence in a clear and concise manner
 - document feedback from others involved in the assessment

reporting findings to the qualified assessor, including an explanation of how the assessment meets the rules of evidence on each of the three occasions.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- competency-based assessment
- the principles of assessment
- the rules of evidence
- the different purposes of assessment
- the diversity of assessment contexts
- different types of evidence
- evidence-gathering methods
- the purpose and features of assessment tools, and assessment plans

- potential barriers and processes relating to evidence-gathering procedures, and assessment processes
- the organisational policies and procedures relevant to this unit of competency.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to qualified assessors for consultation.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

TAEDEL301 Provide work skill instruction

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with <i>TAE Training and Education Training Package Version 2.0</i> . |

Application

This unit describes the skills and knowledge required to conduct individual and group instruction, demonstrate work skills and assess the success of training and one's own training performance, using existing learning resources in a safe and comfortable learning environment.

It emphasises the training as being driven by the work process and context, and applies to a person working under supervision as a work skill instructor in a wide range of settings not restricted to training organisations,

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Delivery and facilitation

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Organise instruction and demonstration | 1.1 Gather information about learner characteristics and learning needs 1.2 Confirm a safe learning environment 1.3 Gather and check instruction, demonstration objectives, and seek assistance if required 1.4 Access and review relevant learning resources and learning |

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| | <p>materials for suitability and relevance, and seek assistance to interpret the contextual application</p> <p>1.5 Organise access to necessary equipment or physical resources required for instruction and demonstration</p> <p>1.6 Notify learners of details regarding the implementation of the learning program and/or delivery plan</p> |
| 2. Conduct instruction and demonstration | <p>2.1 Use interpersonal skills with learners to establish a safe and comfortable learning environment</p> <p>2.2 Follow the learning program and/or delivery plan to cover all learning objectives</p> <p>2.3 Brief learners on any workplace health and safety (WHS) procedures and requirements prior to, and during, training</p> <p>2.4 Use delivery techniques to structure, pace and enhance learning</p> <p>2.5 Apply coaching techniques to assist learning</p> <p>2.6 Use communication skills to provide information, instruct learners and demonstrate relevant work skills</p> <p>2.7 Provide opportunities for practice during instruction and through work activities</p> <p>2.8 Provide and discuss feedback on learner performance to support learning</p> |
| 3. Check training performance | <p>3.1 Use measures to ensure learners are acquiring, and can use, new technical and generic skills and knowledge</p> <p>3.2 Monitor learner progress and outcomes in consultation with the learner</p> <p>3.3 Review relationship between the trainer/coach and the learner, and adjust to suit learner needs</p> |
| 4. Review personal training performance | <p>4.1 Reflect upon personal performance in providing instruction and demonstration, and document strategies for improvement</p> <p>4.2 Maintain, store and secure learner records, according to organisational and legal requirements</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------|--|--|
| Learning | 4.1 | <ul style="list-style-type: none"> Reflects on practice to improve |
| Reading | 1.1, 1.3, 1.4, 2.2 | <ul style="list-style-type: none"> Sources and interprets processes and procedures, learning resources and information relevant to providing a work instruction and delivery |
| Writing | 1.4, 1.6, 2.3, 2.6, 2.8, 3.2, 4.1, 4.2 | <ul style="list-style-type: none"> Accurately maintains learner records and documentation appropriate to the learning context and audience |
| Oral Communication | 1.1, 1.6, 2.3, 2.4, 2.6 | <ul style="list-style-type: none"> Uses appropriate communication strategies to engage, build rapport, provide instruction, monitor progress and provide feedback to individuals or groups |
| Interact with others | 1.2, 1.3, 2.1, 2.5, 2.8, 3.2 | <ul style="list-style-type: none"> Recognises the importance of consultation and negotiation while collaborating to confirm strategy and achieve required outcomes Asks questions in order to clarify understanding, and to provide and seek feedback Builds rapport to establish effective working relationships and to achieve effective outcomes |
| Get the work done | 1.1-1.6, 2.1-2.8, 3.1-3.3, 4.1, 4.2 | <ul style="list-style-type: none"> Organises and completes work according to defined requirements, taking responsibility for some decisions and sequencing tasks to achieve efficient outcomes Identifies and responds to potential risks, problems and opportunities for improvement and considers options for different approaches |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| TA EDEL301 Provide work skill instruction | TA EDEL301A Provide work skill instruction | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

Assessment Requirements for TAEDEL301 Provide work skill instruction

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with <i>TAE Training and Education Training Package Version 2.0</i> . |

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- carrying out a minimum of three training sessions, involving demonstrating and instructing particular work skills for at least two different individuals or small groups, with each session addressing:
 - different learning objectives
 - a range of delivery techniques and effective communication skills appropriate to the audience.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- learner characteristics and needs
- the content and requirements of the relevant learning program, and/or the delivery plan
- the sources and availability of relevant learning resources and learning materials
- the content of relevant learning resources and learning materials
- training techniques that enhance learning, and when to use them
- introductory knowledge of learning principles and learning styles
- key workplace health and safety (WHS) issues in the learning environment, including:
 - roles and responsibilities of key personnel
 - responsibilities of learners
 - relevant policies and procedures, including hazard identification, risk assessment, reporting requirements, safe use of equipment and emergency procedures
 - risk controls for the specific learning environment.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment and include access to any necessary workplace documents.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

TAEDEL401 Plan, organise and deliver group-based learning

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This was first released with <i>TAE Training and Education Training Package Release 2.1</i> . Minor update to Assessment Conditions. |
| Release 1 | This version first released with <i>TAE Training and Education Training Package Release 2.0</i> . |

Application

This unit describes the skills and knowledge required to plan, organise and deliver training for individuals within a group.

It applies to a person working as an entry-level trainer, teacher or facilitator structuring a learning program developed by others in, or with, a training and assessment organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Delivery and facilitation

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Interpret learning environment and delivery requirements | 1.1 Access, read, and interpret learning program documentation to determine delivery requirements 1.2 Use available information and documentation to identify group and individual learner needs, and learner characteristics 1.3 Identify and assess constraints, and risks to delivery |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 1.4 Confirm personal role and responsibilities in planning, and delivering training, with relevant personnel |
| 2. Prepare session plans | <p>2.1 Refine existing learning objectives according to program requirements and specific needs of individual learners</p> <p>2.2 Develop session plans and document these plans for each segment of the learning program</p> <p>2.3 Use knowledge of learning principles and theories to generate ideas for managing session delivery</p> |
| 3. Prepare resources for delivery | <p>3.1 Contextualise learning materials to meet the needs of the specific learner group</p> <p>3.2 Finalise learning materials and organise facility, technology and equipment needs in time for delivery of learning sessions</p> <p>3.3 Confirm overall delivery arrangements with relevant personnel</p> |
| 4. Deliver and facilitate training sessions | <p>4.1 Conduct each session according to the session plan, modified where appropriate to meet learner needs</p> <p>4.2 Use the diversity of the group as another resource to support learning</p> <p>4.3 Employ a range of delivery methods to optimise learner experiences</p> <p>4.4 Demonstrate effective facilitation skills to ensure effective participation and group management</p> |
| 5. Support and monitor learning | <p>5.1 Monitor, and document, learner progress to ensure outcomes are being achieved, and individual learner needs are being met</p> <p>5.2 Make adjustments to the delivery sessions to reflect specific needs and circumstances</p> <p>5.3 Manage inappropriate behaviour to ensure that learning can take place</p> <p>5.4 Maintain and store learner records according to organisational requirements</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|---|--|
| Reading | 1.1, 1.2, 1.3, 2.1, 3.1, 5.1 | <ul style="list-style-type: none"> Access, read and interpret documentation relevant to the learning context, including program documents, learning materials, policies and procedures relevant to the context |
| Writing | 2.1, 2.2, 2.3, 3.1, 3.2, 3.3, 5.1, 5.2, 5.4 | <ul style="list-style-type: none"> Develops and maintains workplace documentation accurately and in response to required needs |
| Oral Communication | 1.2, 1.3, 4.1, 4.3, 4.4 | <ul style="list-style-type: none"> Uses communication techniques to build rapport and explore requirements Facilitates training in an appropriate style for both individuals and groups |
| Navigate the world of work | 1.4, 5.4 | <ul style="list-style-type: none"> Recognises and follows organisational protocols, policies and procedures relevant to own role |
| Interact with others | 1.4, 3.3, 4.4, 5.3 | <ul style="list-style-type: none"> Cooperates and collaborates with others as part of routine activities to achieve team results, and to confirm that outcomes meet requirements Recognises inappropriate behaviours and the potential for conflict, and implements strategies to maintain an appropriate learning environment |
| Get the work done | 1.1-1.4, 2.1-2.3, 3.1-3.3, 4.1-4.4, 5.1-5.4 | <ul style="list-style-type: none"> Organises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes Identifies and responds to problems and opportunities for improvement and considers options for different approaches Uses information and communications technology (ICT) based tools to access, organise, analyse and display information relevant to role |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---------------------------------------|--|---------------------------|--------------------|
| TA EDEL401 Plan, organise and deliver | TA EDEL401A Plan, organise and deliver | Updated to meet Standards | Equivalent unit |

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|--------------------------|-------------------------------|
| group-based learning | group-based learning | for Training Packages | |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

Assessment Requirements for TAEDEL401 Plan, organise and deliver group-based learning

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This was first released with <i>TAE Training and Education Training Package Release 2.1</i> . Minor update to Assessment Conditions. |
| Release 1 | This version first released with <i>TAE Training and Education Training Package Release 2.0</i> . |

Performance Evidence

The candidate must show evidence of the ability to complete the tasks outlined in the elements and performance criteria of this unit, including:

- facilitating group-based learning by preparing and delivering at least three training sessions, including:
 - at least two consecutive sessions of at least 40 minutes duration, that follow one of the learning program designs, to a learner group of at least eight individuals
 - at least one session delivered to a learner group of at least eight individuals, with evidence of how the characteristics and needs of this group were addressed
- identifying and responding to individual needs
- accessing and using documented resources, and any support personnel required to guide inclusive practices.
-

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- learning theories and principles
- resources available to identify different learner styles
- the relevant industry area and subject matter of the delivery
- the learner group profile, including characteristics and needs of individual learners in the group
- the requirements of the learning program and/or delivery plan, and the content purpose
- different delivery methods and techniques appropriate to face-to-face group delivery

- different techniques for the recognition and resolution of inappropriate behaviours
- behaviours that may indicate learner difficulties, and the methods used to address these difficulties
- the purpose of organisational record-management systems and reporting requirements
- evaluation and revision techniques used to improve session plans
- specific resources, equipment and support services available for learners with special needs
- assessment and risk control measures relating to the facilitation of group-based learning
- policies and procedures relevant to the learning environment.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to learning program designs in use in the learning environment.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

TAEDES501 Design and develop learning strategies

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This was first released with <i>TAE Training and Education Training Package Release 2.1</i> . Minor update to Assessment Conditions. |
| Release 1 | This version first released with <i>TAE Training and Education Training Package Release 2.0</i> . |

Application

This unit describes the skills and knowledge required to design, develop and review learning strategies.

It applies to those who work under limited supervision and use a range of specialised technical or managerial skills to develop learning strategies relevant to both Training Package qualifications and course-based qualifications.

The learning strategy provides an overview or outline only. Detailed guidance is provided in the content of specific learning programs.

No licensing, legislative or certification requirements apply to this unit at the time of publication

Unit Sector

Learning design

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Determine the | 1.1 Clarify the purpose of the learning strategy, likely target |

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| parameters of the learning strategy | <p>groups and their learning needs</p> <p>1.2 Research qualification or other benchmark options for meeting the likely target group needs and select an appropriate option</p> <p>1.3 Consult with relevant people to confirm the parameters of the learning strategy</p> |
| 2. Develop the framework for the learning strategy | <p>2.1 Develop a learning strategy design that reflects the requirements of the selected qualification or other benchmark</p> <p>2.2 Analyse industry or organisation documentation to determine additional and supporting requirements</p> <p>2.3 Research and analyse options for design, based on likely target groups, their learning needs and contexts for delivery</p> <p>2.4 Use appropriate learning theories and instructional design principles to support the learning strategy design</p> <p>2.5 Identify and document learning outcomes</p> <p>2.6 Consult to modify and confirm the framework</p> <p>2.7 Develop the review process for the learning strategy</p> |
| 3. Devise the content and structure of the learning strategy | <p>3.1 Construct content headings from learning outcomes to form an overview of content to be addressed</p> <p>3.2 Sequence the content to support learning and determine overall timelines within operating constraints</p> <p>3.3 Express learning strategy outcomes to reflect both generic and specific learning outcomes to be achieved</p> <p>3.4 Identify and document appropriate delivery and assessment strategies, taking account of the learning parameters, design framework and learning context</p> <p>3.5 Identify and document operational requirements</p> |
| 4. Review the learning strategy | <p>4.1 Review the learning strategy in collaboration with relevant people against specified criteria prior to and post implementation</p> <p>4.2 Document a post-implementation review process that includes measures for identifying the effectiveness and quality of the learning strategy</p> <p>4.3 Make recommendations based on outcomes of the review processes, where appropriate, and document these</p> <p>4.4 Make modifications and document as part of a continuous improvement strategy</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------|--|---|
| Reading | 1.1, 1.2, 2.2, 2.3, 2.5, 3.4, 3.5, 4.1 | <ul style="list-style-type: none"> Sources, analyses and interprets written information, including training standards, organisational policies and procedures and review data to identify relevance for learning strategy and continuous improvement |
| Writing | 1.1, 2.1, 2.4, 2.5, 2.6, 2.7, 3.1, 3.2, 3.3, 3.4, 3.5, 4.2, 4.3, 4.4 | <ul style="list-style-type: none"> Produces documents, including a learning strategy, that incorporates the analysis of information, and is presented in clear and format and style appropriate to audience and context |
| Numeracy | 3.2 | <ul style="list-style-type: none"> Structures timeframes to represent a sequence of events |
| Interact with others | 1.1, 1.3, 2.6, 4.1 | <ul style="list-style-type: none"> Recognises the importance of consultation and collaboration to clarify strategy and receive and incorporate feedback |
| Get the work done | 1.1-1.3, 2.1-2.7, 3.1-3.5, 4.1-4.4 | <ul style="list-style-type: none"> Plans, organises and completes work according to defined requirements taking responsibility for decisions Identifies and responds to problems and opportunities for improvement and considers options for different approaches Sequences tasks to achieve efficient outcomes and identifies appropriate process milestones and performance indicators to monitor progress |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|--|---|---|--------------------|
| TA EDES 501 Design and develop learning strategies | TA EDES 501A Design and develop learning strategies | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

Assessment Requirements for TAEDES501 Design and develop learning strategies

Modification History

| Release | Comments |
|-----------|---|
| Release 2 | This was first released with <i>TAE Training and Education Training Package Release 2.1</i> . Minor update to Assessment Conditions. |
| Release 1 | This version first released with <i>TAE Training and Education Training Package Release 2.0</i> . |

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- preparation and presentation of a minimum of two examples of learning strategies designed by the candidate, with differentiated design structures in each that:
 - reflect the specific requirements of the qualification or skill set, and
 - reflect client needs and the contexts of application
- documentation of a review that provides outcomes and evidence of continuous improvement.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- Training Packages, including the content of Training Packages relevant to the learning strategy
- accredited courses and the similarities and differences between them and the skill sets, or qualifications, within training packages
- NVR/AQTF requirements for Registered Training Organisations (RTOs) in terms of their effect on the design, and development, of learning strategies
- The Australian Qualifications Framework (AQF) including:
 - key features of each qualification type
 - AQF pathways policy including credit transfer
- industry and enterprise requirements, including:

- those relevant to the learning strategy
- industry licensing arrangements, where relevant
- the main branches of learning theory incorporating behavioural learning theory, cognitive learning theory, experiential learning theory, information processing theory and current research on learning, as it relates to teaching in an adult environment
- assessment approaches, including:
 - the basis and rationale for different assessment methods appropriate to the learning strategy.
 -

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to NVR/AQTF requirements for RTOs.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

TAELED803 Implement improved learning practice

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with <i>TAE Training and Education Training Package Version 2.0</i> . |

Application

This unit describes the skills and knowledge required to initiate, and implement, practices that support the improvement of learning strategies in an organisational context. It includes:

- evaluating ways to improve learning practice, managing and monitoring the means by which to improve learning, analysing, and advancing adoption of improved learning practice
- methods for improving learning practice, including developing individual staff members from the perspective of the organisation's needs and imperatives, and enhancing outcomes for learners and candidates.

It applies to leaders or managers who use research, theoretical analysis and professional investigation, to identify ways in which to implement learning practices that build organisational capabilities within a small to medium-sized organisation, or to a significant unit of activity in a large organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Learning and development

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|--|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate ways to | 1.1 Review advances in learning practice within a given |

| ELEMENT | PERFORMANCE CRITERIA |
|---|--|
| improve learning practice | vocational, training, educational or content area 1.2 Review and challenge existing learning practice to develop, and test, improved approaches 1.3 Analyse interests, abilities, relationships and the contextual needs of relevant individuals, when promoting improved learning practice 1.4 Research how a range of appropriate learning theories and instructional design principles can improve learning practice 1.5 Ensure learning practice reflects the qualification requirements for nominated qualification/s |
| 2. Manage and monitor the means to improve learning | 2.1 Observe and assess learner styles with respect to the appropriateness of current vocational, training and educational learning strategies 2.2 Evaluate the role, and impact of, new technologies on learners and training techniques 2.3 Plan improved learning practice based on how learners currently learn 2.4 Plan improved learning practice based on the experience and personal interests of the learner |
| 3. Analyse and advance the adoption of improved learning practice | 3.1 Develop improved vocational, training and educational (VET) learning practice, appropriate to learner characteristics 3.2 Advocate for improved VET learning practice 3.3 Initiate research into improved learning practice 3.4 Design and test improved learning practice in real-world situations 3.5 Mentor colleagues to promote improved learning practice |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|---------|----------------------|--|
| Reading | 1.1, 1.2, 1.3, 1.4, | <ul style="list-style-type: none"> Sources, analyses and interprets written information relevant to learning theories, learning development and |

| | | |
|----------------------------|------------------------------|---|
| | 1.5, 2.2 | continuous improvement, to develop practice |
| Writing | 1.2, 2.3, 2.4, 3.1, 3.2, 3.4 | <ul style="list-style-type: none"> Produce relevant documentation using appropriate language, style and format, appropriate for the audience |
| Oral Communication | 2.1, 3.2 | <ul style="list-style-type: none"> Leads verbal exchanges to elicit information, explore requirements and to make recommendations to improve practice |
| Navigate the world of work | 1.4, 3.1 | <ul style="list-style-type: none"> Develops skills and knowledge of self, and others, related to the role by researching and analysing learning practice |
| Interact with others | 1.3, 3.5 | <ul style="list-style-type: none"> Collaborates and shares knowledge, and experience with others to develop improved practice |
| Get the work done | 1.1-1.5, 2.1-2.4, 3.1-3.5 | <ul style="list-style-type: none"> Uses systematic, analytical processes in complex, non-routine situations, gathering information, and identifying and evaluating options based on learner needs Plans, organises and completes work according to requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes Reviews and evaluates effectiveness of practice and products to inform strategic decisions Uses information and communications technology (ICT) based tools to conduct research, and to complete work tasks |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|---|---|--------------------|
| TAEDEL803 Implement improved learning practice | TAELED703 A Implement improved learning practice | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

Assessment Requirements for TAELED803 Implement improved learning practice

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with <i>TAE Training and Education Training Package Version 2.0</i> . |

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- implementing improved practice in at least one learning environment, including documentation to show:
 - an evaluation of ways in which to improve learning practice
 - how the process was managed and monitored
 - how learning was improved
 - how improved learning practice was advocated for
 - how colleagues were mentored in order to promote learning practice.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- adult learning practice
- contemporary policy and approaches to vocational learning and assessment
- the content and requirements of the relevant delivery and assessment strategies
- the content of learning resources and learning materials
- the design and management of learning objects and content
- different learning styles, and how to encourage learners, including:
 - theoretical learners
 - pragmatic learners
 - activist learners
 - reflective learners
 - kinaesthetic learners
 - audio learners

- visual learners
- tactile learners
- left and right brain learners
- learning strategies, teaching, and assessment methods
- research relating to pedagogical theory and practice, learner interests and changing learning styles, and the application of information and communications technology (ICT) to learning and teaching
- the sources and availability of relevant learning resources, and learning materials
- the theory and practice relating to adult learning
- training techniques that enhance learning and when to use them, including:
 - instruction and explanation
 - questioning
 - practice
 - written information
 - group, pair and team activities
 - individual activities
 - demonstration.

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

TAELED804 Review enterprise e-learning systems and solutions implementation

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with <i>TAE Training and Education Training Package Version 2.0</i> . |

Application

This unit describes the skills and knowledge required to design, review and implement advanced enterprise electronic learning (e-learning) solutions, as a member of a senior management team. It includes evaluating trends in e-learning in relation to organisational plans, monitoring e-learning resources, and ensuring any proposed solutions are tested, and evaluated, against organisational requirements.

This unit applies to leaders or managers working to ensure learning can enhance individual, team and organisational capabilities.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Learning and development

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Evaluate trends in e-learning | 1.1 Identify and differentiate forms of e-learning 1.2 Analyse trends in the deployment of information and communications technology (ICT) in education and learning 1.3 Analyse and evaluate integration of ICT for learning and business purposes |

| ELEMENT | PERFORMANCE CRITERIA |
|---|---|
| | 1.4 Explore how the convergence of different technologies can affect learning practice |
| 2. Monitor e-learning resource alignment to organisational requirements | <p>2.1 Research trends in teaching methods associated with different types of electronic learning resources</p> <p>2.2 Determine the organisation's strategic and learning requirements</p> <p>2.3 Analyse and report risks associated with e-learning implementation</p> <p>2.4 Devise policy and procedures to ensure brief, focus and type of e-learning resources are designed appropriate to organisational requirements</p> <p>2.5 Establish how international e-learning regimes, human resources and learning policies and procedures, will affect the design of e-learning resources</p> |
| 3. Test and evaluate e-learning solutions | <p>3.1 Set the parameters for testing e-learning solutions, consistent with technical, user and organisational requirements</p> <p>3.2 Review e-learning resources and e-learning systems or solutions, against criteria tied to learner and organisational requirements</p> <p>3.3 Adjust learning resource design or delivery methods, where required to meet changing user and organisational requirements</p> <p>3.4 Test and evaluate instructional design principles as appropriate for the given focus and context</p> <p>3.5 Consult with learners, educators, designers and other personnel to evaluate constraints relating to organisation's e-learning systems and resources</p> <p>3.6 Use research findings and reports on suggested improvements to e-learning resources, or systems design, to inform future practice</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|-------|----------------------|-------------|
| | | |

| | | |
|----------------------------|--|--|
| Reading | 1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 3.2 | <ul style="list-style-type: none"> Sources, analyses and interprets written information, relevant to e-learning and the use of ICT in education and learning, assist with the review of e-learning solutions |
| Writing | 2.3, 2.4, 3.1, 3.3, 3.5 | <ul style="list-style-type: none"> Produce documents, including policies and procedures, that incorporate the analysis of information, appropriate to audience and context |
| Oral Communication | 2.2, 2.3 | <ul style="list-style-type: none"> Leads verbal exchanges using appropriate communication techniques to provide and elicit information, explore requirements, and evaluate e-learning systems and solutions |
| Navigate the world of work | 2.4 | <ul style="list-style-type: none"> Takes responsibility for developing and implementing policies, and procedures that meet organisational requirements |
| Interact with others | 3.5 | <ul style="list-style-type: none"> Collaborates and consults with others to build knowledge and understanding necessary for product and process evaluation |
| Get the work done | 1.1-1.4, 2.1-2.5, 3.1-3.6 | <ul style="list-style-type: none"> Uses systematic, analytical processes in complex, non-routine situations, gathering information and identifying and evaluating options based on organisational requirements Plans, organises and completes work according to requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes Reviews and evaluates effectiveness of practice and products to inform strategic decisions Uses ICT-based tools to conduct research, evaluate products, monitor trends and to complete work tasks |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| TAEDEL804 Review enterprise e-learning systems and solutions implementation | TAELED704A Review enterprise e-learning systems and solutions implementation | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

Assessment Requirements for TAELED804 Review enterprise e-learning systems and solutions implementation

Modification History

| Release | Comments |
|-----------|---|
| Release 1 | This version first released with <i>TAE Training and Education Training Package Version 2.0</i> . |

Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- to analyse trends in e-learning
- monitor and evaluate one e-learning solution set-up for one business need, or the needs of a specified user group
- document, review and evaluate the e-learning resources and policies, and procedures to meet organisational and individual learner needs
- make recommendations for improvements.

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- e-learning resources and systems testing and evaluation strategies
- assessment instruments and strategy design
- continuous improvement processes
- information technology principles and terminology, for example, those related to using the internet, reviewing technology capabilities, describing e-learning methodologies, and using related vocabulary
- how to create an effective learning experience using electronic technology
- instructional design for electronic materials, including:
 - systematic instructional strategies
 - learning design principles
 - criterion-referenced assessment
 - the order of increasing difficulty
 - opportunities for the review of material, and repetition
 - need for interactivity

- the inclusion of a variety of approaches and techniques for presenting information and activities
- the structure and sequencing of information
- what happens if the learner makes a mistake
- how to get help
- the techniques to hold a user's attention
- designing a visual interface for improved learning, including graphics, use of fonts, and white space, and repetitive items
- learning strategy design
- organisational learning theory
- the organisational policies and procedures related to e-learning systems
- quality management compliance requirements
- relevant obligations under the system requirements
- a range of e-learning environments, and their application, in designing e-learning resources.
-

Assessment Conditions

Gather evidence to demonstrate consistent performance in conditions that are safe and replicate the workplace. Conditions must be typical of those experienced in the training and assessment environment, and include access to an e-learning system.

Assessors must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=35337905-785d-4f93-8777-e9991ad4c6c3>

TLIE4006 Collect, analyse and present workplace data and information

Modification History

Release 1. This is the first release of this unit of competency in the TLI Transport and Logistics Training Package.

Application

This unit involves the skills and knowledge required to collect, analyse and present workplace data and information as part of workplace operations.

It includes identifying required information, analysing and preparing information for use, explaining information and presenting workplace information to others.

Work is performed under general or limited supervision, generally within a team environment.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Pre-requisite Unit

Not applicable.

Competency Field

E – Communication and Calculation

Unit Sector

Not applicable.

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1 Collect required data

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

1.1 Purpose of data and information collection is confirmed

- | | |
|---|---|
| and information | 1.2 Sources of data and information are established |
| | 1.3 Appropriate data and information is identified |
| 2 Prepare data and information for use | 2.1 Data and information is collated and analysed in accordance with workplace procedures |
| | 2.2 Data and information are organised and presented in a logical manner |
| | 2.3 Checks for accuracy are made |
| 3 Explain information | 3.1 Data and information collection and analysis is explained to others in a way that effectively contributes to workplace operations |
| | 3.2 Outcomes of data and information analysis are presented to others using appropriate presentation modes and resources |
| | 3.3 Questions are answered and appropriate clarification is given |
| 4 Present workplace information | 4.1 Information is processed and forwarded to appropriate personnel in accordance with workplace procedures |
| | 4.2 Processed information is collated and stored in accordance with workplace procedures |

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions can be found in the Companion Volume Implementation Guide.

Unit Mapping Information

This unit replaces and is equivalent to TLIE4006A Collect, analyse and present workplace data and information.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=df441c6e-213d-43e3-874c-0b3f7036d851>

Assessment Requirements for TLIE4006 Collect, analyse and present workplace data and information

Modification History

Release 1. This is the first release of this unit of competency in the TLI Transport and Logistics Training Package.

Performance Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all of the requirements of the elements and performance criteria on at least one occasion and include:

- applying relevant legislation and workplace procedures
- communicating and working effectively with others when collecting, analysing and presenting workplace data and information
- completing relevant documentation
- identifying and using required communications and presentation technology
- monitoring and prioritising work activities in terms of planned schedule
- planning own work including predicting consequences and identifying improvements
- reading, interpreting and following relevant instructions and procedures
- working systematically with required attention to detail.

Knowledge Evidence

Evidence required to demonstrate competence in this unit must be relevant to and satisfy all of the requirements of the elements and performance criteria and include knowledge of:

- presentation and communication techniques including barriers to effective communication and how to overcome them
- principles of effective presentation and communication of information
- protocols and procedures for the collection, analysis and presentation of workplace data and information using relevant technology
- relevant procedures and duty of care requirements
- sources of data and information and procedures for processing the information for workplace use
- typical presentation and communications problems, and appropriate action and solutions.

Assessment Conditions

As a minimum, assessors must satisfy applicable regulatory requirements, which include requirements in the *Standards for Registered Training Organisations* current at the time of assessment.

As a minimum, assessment must satisfy applicable regulatory requirements, which include requirements in the *Standards for Registered Training Organisations* current at the time of assessment.

Assessment must occur in workplace operational situations where it is appropriate to do so; where this is not appropriate, assessment must occur in simulated workplace operational situations that replicate workplace conditions.

Assessment processes and techniques must be appropriate to the language, literacy and numeracy requirements of the work being performed and the needs of the candidate.

Resources for assessment include:

- a range of relevant exercises, case studies and/or simulations
- relevant and appropriate materials, tools, equipment and personal protective equipment currently used in industry
- applicable documentation including workplace procedures, regulations, codes of practice and operation manuals.
-

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=df441c6e-213d-43e3-874c-0b3f7036d851>

BSB Business Services Training Package

Modification History

| Release Number | Release Date | Comments |
|----------------|--------------|---|
| Release 7.0 | October 2020 | <p>AISC endorsement of the following BSB components.</p> <p>Qualifications</p> <p>33 qualifications were updated from <i>BSB Business Services Training Package Version 6.1</i>:</p> <ul style="list-style-type: none"> • BSB10120 Certificate I in Workplace Skills • BSB20120 Certificate II in Workplace Skills • BSB30120 Certificate III in Business • BSB30220 Certificate III in Entrepreneurship and New Business • BSB30320 Certificate III in Legal Services • BSB30420 Certificate III in Library and Information Services • BSB40120 Certificate IV in Business • BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance • BSB40320 Certificate IV in Entrepreneurship and New Business • BSB40420 Certificate IV in Human Resource Management • BSB40520 Certificate IV in Leadership and Management • BSB40620 Certificate IV in Legal Services • BSB40720 Certificate IV in Library and Information Services • BSB40820 Certificate IV in Marketing and Communication • BSB40920 Certificate IV in Project Management Practice • BSB50120 Diploma of Business • BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance • BSB50320 Diploma of Human Resource Management • BSB50420 Diploma of Leadership and Management |

| | | |
|--|--|--|
| | | <ul style="list-style-type: none"> • BSB50520 Diploma of Library and Information Services • BSB50620 Diploma of Marketing and Communication • BSB50720 Diploma of Paralegal Services • BSB50820 Diploma of Project Management • BSB50920 Diploma of Quality Auditing • BSB60120 Advanced Diploma of Business • BSB60220 Advanced Diploma of Conveyancing • BSB60320 Advanced Diploma of Human Resource Management • BSB60420 Advanced Diploma of Leadership and Management • BSB60520 Advanced Diploma of Marketing and Communication • BSB60720 Advanced Diploma of Program Management • BSB80120 Graduate Diploma of Management (Learning) • BSB80220 Graduate Diploma of Portfolio Management • BSB80320 Graduate Diploma of Strategic Leadership. <p>7 qualifications were deleted from <i>BSB Business Services Training Package Version 6.1</i>:</p> <ul style="list-style-type: none"> • BSB30515 Certificate III in Business Administration (International Education) • BSB30615 Certificate III in International Trade • BSB40715 Certificate IV in Franchising • BSB40915 Certificate IV in Governance • BSB50515 Diploma of Franchising • BSB52318 Diploma of Governance • BSB80315 Graduate Certificate in Leadership Diversity. <p>Units of competency</p> <p>20 units of competency were newly created for this <i>BSB Business Services Training Package Version 7.0</i>:</p> <ul style="list-style-type: none"> • BSBCMM412 Lead difficult conversations • BSBCNV616 Comply with tax obligations in a conveyancing transaction |
|--|--|--|

| | | |
|--|--|--|
| | | <ul style="list-style-type: none"> • BSBCRT611 Apply critical thinking for complex problem solving • BSBFIN502 Manage financial compliance • BSBINS502 Coordinate data management • BSBINS515 Participate in archiving activities • BSBINS516 Undertake cataloguing activities • BSBLEG425 Apply principles of legal project management • BSBLEG531 Apply legal principles in administrative law matters • BSBLEG533 Support alternative dispute resolution processes • BSBLEG534 Take instructions in a legal services environment • BSBMKG628 Lead organisational public relations • BSBOPS302 Identify business risk • BSBOPS306 Record stakeholder interactions • BSBPMG541 Manage complex projects • BSBSUS412 Develop and implement workplace sustainability plans • BSBSUS413 Evaluate and report on workplace sustainability • BSBTEC203 Research using the internet • BSBTEC601 Review organisational digital strategy • BSBTWK601 Develop and maintain strategic business networks. <p>283 units of competency were updated from <i>BSB Business Services Training Package Version 6.1</i>:</p> <ul style="list-style-type: none"> • BSBAUD411 Participate in quality audits • BSBAUD412 Work within compliance frameworks • BSBAUD511 Initiate quality audits • BSBAUD512 Lead quality audits • BSBAUD513 Report on quality audits • BSBAUD514 Interpret compliance requirements • BSBAUD515 Evaluate and review compliance • BSBAUD516 Develop and monitor processes for the management of breaches in compliance requirements • BSBAUD601 Establish and manage compliance management systems • BSBCMM211 Apply communication skills • BSBCMM411 Make presentations |
|--|--|--|

| | | |
|--|--|--|
| | | <ul style="list-style-type: none"> • BSBCMM511 Communicate with influence • BSBCNV511 Take instructions in relation to a conveyancing transaction • BSBCNV512 Finalise the conveyancing transaction • BSBCNV611 Interpret a legal document and provide advice in a conveyancing transaction • BSBCNV612 Identify and apply legal requirements for a conveyancing transaction • BSBCNV613 Prepare legal documents for a conveyancing transaction • BSBCNV614 Apply principles of trust accounting • BSBCNV615 Interpret search results for a conveyancing transaction • BSBCRT201 Develop and apply thinking and problem solving skills • BSBCRT311 Apply critical thinking skills in a team environment • BSBCRT411 Apply critical thinking to work practices • BSBCRT412 Articulate, present and debate ideas • BSBCRT413 Collaborate in creative processes • BSBCRT511 Develop critical thinking in others • BSBCRT512 Originate and develop concepts • BSBDAT201 Collect and record data • BSBDAT501 Analyse data • BSBESB301 Investigate business opportunities • BSBESB302 Develop and present business proposals • BSBESB303 Organise finances for new business ventures • BSBESB304 Determine resource requirements for new business ventures • BSBESB305 Address compliance requirements for new business ventures • BSBESB401 Research and develop business plans • BSBESB402 Establish legal and risk management requirements of new business ventures • BSBESB403 Plan finances for new business ventures • BSBESB404 Market new business ventures • BSBESB405 Manage compliance for small businesses • BSBESB406 Establish operational strategies and procedures for new business ventures |
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| | | <ul style="list-style-type: none"> • BSBESB407 Manage finances for new business ventures • BSBFIN301 Process financial transactions • BSBFIN302 Maintain financial records • BSBFIN401 Report on financial activity • BSBFIN501 Manage budgets and financial plans • BSBFIN601 Manage organisational finances • BSBFIN801 Lead financial strategy development • BSBHRM411 Administer performance development processes • BSBHRM412 Support employee and industrial relations • BSBHRM413 Support the learning and development of teams and individuals • BSBHRM414 Use human resources information systems • BSBHRM415 Coordinate recruitment and onboarding • BSBHRM416 Process payroll • BSBHRM417 Support human resources functions and processes • BSBHRM521 Facilitate performance development processes • BSBHRM522 Manage employee and industrial relations • BSBHRM523 Coordinate the learning and development of teams and individuals • BSBHRM524 Coordinate workforce plan implementation • BSBHRM525 Manage recruitment and onboarding • BSBHRM526 Manage payroll • BSBHRM527 Coordinate human resource functions and processes • BSBHRM528 Coordinate remuneration and employee benefits • BSBHRM529 Coordinate separation and termination processes • BSBHRM530 Coordinate rehabilitation and return to work programs • BSBHRM531 Coordinate health and wellness programs • BSBHRM611 Contribute to organisational performance development • BSBHRM612 Contribute to the development of |
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| | | <p>employee and industrial relations strategies</p> <ul style="list-style-type: none"> • BSBHRM613 Contribute to the development of learning and development strategies • BSBHRM614 Contribute to strategic workforce planning • BSBHRM615 Contribute to the development of diversity and inclusion strategies • BSBINS201 Process and maintain workplace information • BSBINS202 Handle receipt and dispatch of information • BSBINS203 Assist with circulation services • BSBINS301 Develop and use information literacy skills • BSBINS302 Organise workplace information • BSBINS303 Use knowledge management systems • BSBINS304 Process and maintain information resources • BSBINS305 Participate in cataloguing activities • BSBINS306 Provide multimedia support • BSBINS307 Retrieve information from records • BSBINS308 Control records • BSBINS309 Maintain business records • BSBINS401 Analyse and present research information • BSBINS402 Coordinate workplace information systems • BSBINS403 Obtain information from external and networked sources • BSBINS404 Search library and information databases • BSBINS405 Use integrated library management systems • BSBINS406 Assist customers to access information • BSBINS407 Consolidate and maintain library industry knowledge • BSBINS408 Provide information from and about records • BSBINS409 Maintain and monitor digital information and records • BSBINS410 Implement records systems for small business • BSBINS501 Implement information and knowledge management systems |
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| | | <ul style="list-style-type: none">• BSBINS503 Monitor compliance with copyright and licence requirements• BSBINS504 Maintain digital repositories• BSBINS505 Provide subject access and classify material• BSBINS506 Implement lending and borrowing processes for collections• BSBINS507 Use advanced functions of integrated library management systems• BSBINS508 Research and analyse information to meet library customer needs• BSBINS509 Promote literature and reading• BSBINS510 Develop community and stakeholder relationships in a library environment• BSBINS511 Develop and promote library activities, events and public programs• BSBINS512 Monitor business records systems• BSBINS513 Contribute to records management framework• BSBINS514 Contribute to records retention and disposal schedule• BSBINS601 Manage knowledge and information• BSBINS602 Extend own information literacy skills to locate information• BSBINS603 Initiate and lead applied research• BSBINS604 Contribute to collection management• BSBLDR301 Support effective workplace relationships• BSBLDR411 Demonstrate leadership in the workplace• BSBLDR412 Communicate effectively as a workplace leader• BSBLDR413 Lead effective workplace relationships• BSBLDR414 Lead team effectiveness• BSBLDR521 Lead the development of diverse workforces• BSBLDR522 Manage people performance• BSBLDR523 Lead and manage effective workplace relationships• BSBLDR601 Lead and manage organisational change• BSBLDR602 Provide leadership across the organisation |
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| | | <ul style="list-style-type: none"> • BSBLDR811 Lead strategic transformation • BSBLDR812 Develop and cultivate collaborative partnerships and relationships • BSBLDR813 Lead and influence ethical practice • BSBLEG311 Work in a legal services environment • BSBLEG312 Carry out search of the public record • BSBLEG313 Lodge documents in a legal services environment • BSBLEG314 Protect information in a legal services environment • BSBLEG315 Assist in planning activities in a legal services environment • BSBLEG421 Apply understanding of the Australian legal system • BSBLEG422 Maintain a file in a legal services environment • BSBLEG423 Conduct simple legal research • BSBLEG424 Support the drafting of complex legal documents • BSBLEG521 Conduct and apply legal research • BSBLEG522 Apply legal principles in contract law matters • BSBLEG523 Apply legal principles in tort law matters • BSBLEG524 Apply principles of evidence law in matters under litigation • BSBLEG525 Apply legal principles in intellectual property law matters • BSBLEG526 Apply legal principles in criminal law matters • BSBLEG527 Apply legal principles in family law matters • BSBLEG528 Apply legal principles in property law matters • BSBLEG529 Apply legal principles in corporation law matters • BSBLEG530 Apply legal principles in wills and probate matters • BSBLEG532 Assist with court procedure • BSBMKG431 Assess marketing opportunities • BSBMKG432 Research international markets • BSBMKG433 Undertake marketing activities • BSBMKG434 Promote products and services • BSBMKG435 Analyse consumer behaviour |
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| | | <ul style="list-style-type: none">• BSBMKG436 Design and test direct marketing activities• BSBMKG437 Create and optimise digital media• BSBMKG438 Implement and monitor advertising production• BSBMKG439 Develop and apply knowledge of communications industry• BSBMKG440 Apply marketing communication across a convergent industry• BSBMKG441 Develop public relations documents• BSBMKG442 Conduct e-marketing communications• BSBMKG541 Identify and evaluate marketing opportunities• BSBMKG542 Establish and monitor the marketing mix• BSBMKG543 Plan and interpret market research• BSBMKG544 Plan and monitor direct marketing activities• BSBMKG545 Conduct marketing audits• BSBMKG546 Develop social media engagement plans• BSBMKG547 Develop strategies to monetise digital engagement• BSBMKG548 Forecast international market and business needs• BSBMKG549 Profile and analyse consumer behaviour for international markets• BSBMKG550 Promote products and services to international markets• BSBMKG551 Create multiplatform advertisements for mass media• BSBMKG552 Design and develop marketing communication plans• BSBMKG553 Develop public relations campaigns• BSBMKG554 Plan and develop public relations publications• BSBMKG555 Write persuasive copy• BSBMKG621 Develop organisational marketing strategy• BSBMKG622 Manage organisational marketing processes• BSBMKG623 Develop marketing plans• BSBMKG624 Manage market research |
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| | | <ul style="list-style-type: none"> • BSBMKG625 Implement and manage international marketing programs • BSBMKG626 Develop advertising campaigns • BSBMKG627 Execute advertising campaigns • BSBOPS101 Use business resources • BSBOPS201 Work effectively in business environments • BSBOPS202 Engage with customers • BSBOPS203 Deliver a service to customers • BSBOPS301 Maintain business resources • BSBOPS303 Organise schedules • BSBOPS304 Deliver and monitor a service to customers • BSBOPS305 Process customer complaints • BSBOPS401 Coordinate business resources • BSBOPS402 Coordinate business operational plans • BSBOPS403 Apply business risk management processes • BSBOPS404 Implement customer service strategies • BSBOPS405 Organise business meetings • BSBOPS406 Participate in organisational governance • BSBOPS501 Manage business resources • BSBOPS502 Manage business operational plans • BSBOPS503 Develop administrative systems • BSBOPS504 Manage business risk • BSBOPS505 Manage organisational customer service • BSBOPS601 Develop and implement business plans • BSBOPS602 Monitor corporate governance activities • BSBPEF101 Plan and prepare for work readiness • BSBPEF201 Support personal wellbeing in the workplace • BSBPEF202 Plan and apply time management • BSBPEF301 Organise personal work priorities • BSBPEF302 Develop self-awareness • BSBPEF401 Manage personal health and wellbeing • BSBPEF402 Develop personal work priorities • BSBPEF403 Lead personal development • BSBPEF501 Manage personal and professional development |
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| | | <ul style="list-style-type: none"> • BSBPEF502 Develop and use emotional intelligence • BSBPMG420 Apply project scope management techniques • BSBPMG421 Apply project time management techniques • BSBPMG422 Apply project quality management techniques • BSBPMG423 Apply project cost management techniques • BSBPMG424 Apply project human resources management approaches • BSBPMG425 Apply project information management and communications techniques • BSBPMG426 Apply project risk management techniques • BSBPMG427 Apply project procurement procedures • BSBPMG428 Apply project life cycle management processes • BSBPMG429 Apply project stakeholder engagement techniques • BSBPMG430 Undertake project work • BSBPMG530 Manage project scope • BSBPMG531 Manage project time • BSBPMG532 Manage project quality • BSBPMG533 Manage project cost • BSBPMG534 Manage project human resources • BSBPMG535 Manage project information and communication • BSBPMG536 Manage project risk • BSBPMG537 Manage project procurement • BSBPMG538 Manage project stakeholder engagement • BSBPMG539 Manage project governance • BSBPMG540 Manage project integration • BSBPMG630 Enable program execution • BSBPMG631 Manage program delivery • BSBPMG632 Manage program risk • BSBPMG633 Provide leadership for the program • BSBPMG634 Facilitate stakeholder engagement • BSBPMG635 Implement program governance • BSBPMG636 Manage benefits • BSBPMG637 Engage in collaborative alliances |
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| | | <ul style="list-style-type: none"> • BSBPMG810 Prioritise projects and programs • BSBPMG811 Select and balance the portfolio • BSBPMG812 Manage and review portfolio performance • BSBPMG813 Govern the portfolio • BSBPMG814 Lead the portfolio • BSBPMG815 Manage portfolio communications and change • BSBPMG816 Manage portfolio resources • BSBPMG817 Manage portfolio risk • BSBSTR301 Contribute to continuous improvement • BSBSTR401 Promote innovation in team environments • BSBSTR402 Implement continuous improvement • BSBSTR501 Establish innovative work environments • BSBSTR502 Facilitate continuous improvement • BSBSTR503 Develop organisational policy • BSBSTR601 Manage innovation and continuous improvement • BSBSTR602 Develop organisational strategies • BSBSTR603 Develop business continuity plans • BSBSTR801 Lead innovative thinking and practice • BSBSTR802 Lead strategic planning processes for an organisation • BSBSTR803 Establish business continuity management strategies • BSBSUS211 Participate in sustainable work practices • BSBSUS411 Implement and monitor environmentally sustainable work practices • BSBSUS511 Develop workplace policies and procedures for sustainability • BSBSUS601 Lead corporate social responsibility • BSBTEC101 Operate digital devices • BSBTEC201 Use business software applications • BSBTEC202 Use digital technologies to communicate in a work environment • BSBTEC301 Design and produce business documents • BSBTEC302 Design and produce spreadsheets • BSBTEC303 Create electronic presentations • BSBTEC401 Design and produce complex text |
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| | | <p>documents</p> <ul style="list-style-type: none"> • BSBTEC402 Design and produce complex spreadsheets • BSBTEC403 Apply digital solutions to work processes • BSBTEC404 Use digital technologies to collaborate in a work environment • BSBTEC405 Review and maintain organisation's digital presence • BSBTEC501 Develop and implement an e-commerce strategy • BSBTWK201 Work effectively with others • BSBTWK301 Use inclusive work practices • BSBTWK401 Build and maintain business relationships • BSBTWK501 Lead diversity and inclusion • BSBTWK502 Manage team effectiveness • BSBTWK503 Manage meetings • BSBWHS211 Contribute to the health and safety of self and others • BSBWHS311 Assist with maintaining workplace safety • BSBWHS411 Implement and monitor WHS policies, procedures and programs • BSBWRT311 Write simple documents • BSBWRT411 Write complex documents. <p>The following BSB components were added to <i>BSB Business Services Training Package Version 7.0</i> as part of an SSO upgrade.</p> <p>Four qualifications were updated to include updated elective units:</p> <ul style="list-style-type: none"> • BSB30719 Certificate III in Work Health and Safety • BSB41419 Certificate IV in Work Health and Safety • BSB51319 Diploma of Work Health and Safety • BSB60619 Advanced Diploma of Work Health and Safety. <p>15 units of competency were transferred to the CUA Creative Arts and Culture Training Package:</p> |
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| | | <ul style="list-style-type: none"> • BSBDES201 Follow a design process • BSBDES202 Evaluate the nature of design in a specific industry context • BSBDES301 Explore the use of colour • BSBDES302 Explore and apply the creative design process to 2D forms • BSBDES303 Explore and apply the creative design process to 3D forms • BSBDES304 Source and apply design industry knowledge • BSBDES305 Source and apply information on the history and theory of design • BSBDES401 Generate design solutions • BSBDES402 Interpret and respond to a design brief • BSBDES403 Develop and extend design skills and practice • BSBDES501 Implement design solutions • BSBDES502 Establish, negotiate and refine a design brief • BSBDES601 Manage design realisation • BSBDES602 Research global design trends • BSBDES801 Research and apply design theory. <p>33 skill sets were newly created for this <i>BSB Business Services Training Package Version 7.0</i>:</p> <ul style="list-style-type: none"> • BSBSS00096 Innovation Practice Skill Set • BSBSS00097 Innovation Leadership Skill Set • BSBSS00098 Marketing Foundations Skill Set • BSBSS00099 Communications and Public Relations Foundations Skill Set • BSBSS00100 Business Operations Support Skill Set • BSBSS00101 Business Operations Management Skill Set • BSBSS00102 Micro Business Skill Set • BSBSS00103 New Business Ventures Skill Set • BSBSS00104 Small Business Management Skill Set • BSBSS00105 Human Resources Foundations Skill Set • BSBSS00106 Introduction to Paralegal Services Skill Set • BSBSS00107 Marketing and Communication |
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| | | <p>Foundations Skill Set</p> <ul style="list-style-type: none"> • BSBSS00108 Marketing and Communication Skill Set • BSBSS00109 Introduction to Team Management Skill Set • BSBSS00110 Business Development Skill Set • BSBSS00111 Human Resources Advisor Skill Set • BSBSS00112 Workplace Technology Skill Set • BSBSS00113 Digital Business Administration Skill Set • BSBSS00114 Organisational Governance Skill Set • BSBSS00115 Copyright Management Skill Set • BSBSS00116 Campaign Management Skill Set • BSBSS00117 Diversity and Inclusion Skill Set • BSBSS00118 Procurement Manager Skill Set • BSBSS00119 Customer Service Skill Set • BSBSS00120 Administrative Assistant Skill Set • BSBSS00121 Medical Administration Skill Set • BSBSS00122 Compliance Skill Set • BSBSS00123 Records and Information Management Skill Set • BSBSS00124 Workplace IT Foundations Skill Set • BSBSS00125 Workplace Foundations Skill Set • BSBSS00126 Contact Centre Skill Set • BSBSS00127 Contact Centre Team Manager Skill Set • BSBSS00128 Lead Auditor Skill Set. |
| Release 6.1 | July 2020 | <p>AISC endorsement of the following BSB components.</p> <p>Units of competency</p> <p>1 new unit of competency was developed for this <i>BSB Business Services Training Package Version 6.1</i>:</p> <ul style="list-style-type: none"> • BSBWHS332X Apply infection prevention and control procedures to own work activities <p>The following BSB components were added to <i>BSB Business Services Training Package Version 6.1</i> as part of an SSO upgrade.</p> <p>Two qualifications were updated to include additional elective units:</p> <ul style="list-style-type: none"> • BSB30115 Certificate III in Business • BSB30719 Certificate III in Work Health and Safety |

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| | | <p>One skill set was created:</p> <ul style="list-style-type: none"> • BSBSS00095 Cross-Sector Infection Control Skill Set |
| Release 6.0 | February 2020 | <p>AISC endorsement of the following BSB components.</p> <p>Units of Competency</p> <p>17 new units of competency were developed for this <i>BSB Business Services Training Package Version 6.0</i>:</p> <ul style="list-style-type: none"> • BSBXBD401 Capture and store big data • BSBXBD402 Test big data samples • BSBXBD403 Analyse big data • BSBXBD404 Use big data for operational decision making • BSBXBD405 Develop procedures for managing big data • BSBXBD406 Present big data insights • BSBXBD407 Protect big data integrity • BSBXBD408 Implement and review procedures for managing big data • BSBXBD501 Develop big data strategy • BSBXCS301 Protect own personal online profile from cyber security threats • BSBXCS302 Identify and report online security threats • BSBXCS303 Securely manage personally identifiable information and workplace information • BSBXCS401 Maintain security of digital devices • BSBXCS402 Promote workplace cyber security awareness and practices • BSBXCS403 Contribute to cyber security threat assessments • BSBXCS404 Contribute to cyber security risk management • BSBXCS405 Contribute to cyber security incident responses <p>The following BSB components were added to BSB Business Services Training Package Version 6.0 as part of an SSO upgrade.</p> <p>Eight qualifications were updated to include additional elective units:</p> <ul style="list-style-type: none"> • BSB30315 Certificate III in Micro Business Operations |

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| | | <ul style="list-style-type: none"> • BSB42015 Certificate IV in Leadership and Management • BSB41515 Certificate IV in Project Management Practice • BSB41618 Certificate IV in Business (Procurement) • BSB50215 Diploma in Business • BSB51918 Diploma of Leadership and Management • BSB51415 Diploma of Project Management • BSB51518 Diploma of Business (Procurement) <p>Four skill sets were created:</p> <ul style="list-style-type: none"> • BSBSS00091 Capture and Present Big Data Skill Set • BSBSS00092 Manage Big Data Skill Set • BSBSS00093 Cyber Security Threat Assessment and Risk Management Skill Set • BSBSS00094 Cyber Security Awareness Skill Set |
| Release 5.0 | September 2019 | <p>AISC endorsement of the following BSB components.</p> <p>Qualifications</p> <p>Four qualifications were updated from the <i>BSB Business Services Training Package</i> Version 4.0:</p> <ul style="list-style-type: none"> • BSB30719 Certificate III in Work Health and Safety • BSB41419 Certificate IV in Work Health and Safety • BSB51319 Diploma of Work Health and Safety • BSB60619 Advanced Diploma of Work Health and Safety. <p>Units of competency</p> <p>7 new units of competency were developed for this <i>BSB Business Services Training Package</i> Version 5.0:</p> <ul style="list-style-type: none"> • BSBWHS331 Participate in identifying and controlling hazardous chemicals • BSBWHS431 Develop processes and procedures for controlling hazardous chemicals in the workplace • BSBWHS512 Contribute to managing work-related psychological health and safety • BSBWHS514 Manage WHS compliance of contractors • BSBWHS531 Implement and evaluate system of |

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| | | <p>work for managing hazardous chemicals</p> <ul style="list-style-type: none"> • BSBWHS611 Develop and implement strategies that support work-related psychological health and safety • BSBWHS612 Develop and implement a strategy to support a positive WHS culture. <p>26 units of competency were updated from the <i>BSB Business Services Training Package</i> Version 4.0:</p> <p>25 units supersede and are equivalent to their previous versions:</p> <ul style="list-style-type: none"> • BSBWHS307 Apply knowledge of WHS laws in the workplace • BSBWHS308 Participate in WHS hazard identification, risk assessment and risk control processes • BSBWHS309 Contribute effectively to WHS communication and consultation processes • BSBWHS310 Contribute to WHS issue-resolution processes • BSBWHS412 Assist with workplace compliance with WHS laws • BSBWHS413 Contribute to implementation and maintenance of WHS consultation and participation processes • BSBWHS414 Contribute to WHS risk management • BSBWHS415 Contribute to implementing WHS management systems • BSBWHS416 Contribute to workplace incident response • BSBWHS417 Assist with managing WHS implications of return to work • BSBWHS419 Contribute to implementing WHS monitoring processes • BSBWHS513 Lead WHS risk management • BSBWHS515 Lead initial response to and investigate WHS incidents • BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system • BSBWHS517 Contribute to managing a WHS information system • BSBWHS518 Manage WHS hazards associated with maintenance and use of plant • BSBWHS519 Lead the development and use of |
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| | | <p>WHS risk management tools</p> <ul style="list-style-type: none"> • BSBWHS520 Manage implementation of emergency procedures • BSBWHS521 Ensure a safe workplace for a work area • BSBWHS522 Manage WHS consultation and participation processes • BSBWHS613 Evaluate the WHS performance of an organisation • BSBWHS614 Conduct a WHS audit under the guidance of a lead auditor • BSBWHS616 Apply safe design principles to control WHS risks • BSBWHS617 Apply ergonomics to manage WHS risks • BSBWHS631 Apply occupational hygiene principles to manage WHS risks. <p>One unit supersedes but is not equivalent to its previous version:</p> <ul style="list-style-type: none"> • BSBWHS418 Assist with managing WHS compliance of contractors. <p>Three units of competency were deleted from the <i>BSB Business Services Training Package</i> Version 4.0:</p> <ul style="list-style-type: none"> • BSBWHS410 Contribute to work-related health and safety measures and initiatives • BSBWHS601 Apply legislative frameworks for WHS • BSBWHS602 Facilitate WHS activities. <p>The following BSB components were added to <i>BSB Business Services Training Package</i> Version 5.0 as part of an SSO upgrade.</p> <p>14 qualifications were updated to include updated elective units:</p> <ul style="list-style-type: none"> • BSB30215 Certificate III in Customer Engagement • BSB30515 Certificate III in Business Administration (International Education) • BSB42315 Certificate IV in Environmental Management and Sustainability • BSB50315 Diploma of Customer Engagement • BSB50515 Diploma of Franchising • BSB50618 Diploma of Human Resources Management • BSB50815 Diploma of International Business |
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| | | <ul style="list-style-type: none"> • BSB51415 Diploma of Project Management • BSB51518 Diploma of Business (Procurement) • BSB51918 Diploma of Leadership and Management • BSB52015 Diploma of Conveyancing • BSB52115 Diploma of Library and Information Services • BSB52318 Diploma of Governance • BSB61115 Advanced Diploma of Conveyancing. <p>One skill set was created:</p> <ul style="list-style-type: none"> • BSBSS00090 Auditing Skill Set. <p>Four existing units were updated:</p> <ul style="list-style-type: none"> • BSBITU111 Operate a personal digital device • BSBRKG603 Prepare a functional analysis for an organisation • BSBSMB421 Manage small business finances • BSBXTW301 Work in a team. |
| Release 4.0 | February 2019 | <p>Units of Competency</p> <p>Nine new units of competency:</p> <p>BSBXCM301 Engage in workplace communication</p> <p>BSBXCM401 Apply communication strategies in the workplace</p> <p>BSBXCM501 Lead communication in the workplace</p> <p>BSBXDB301 Respond to the service needs of customers and clients with disability</p> <p>BSBXDB401 Develop and implement recruitment processes that are inclusive of people with disability</p> <p>BSBXDB501 Support staff members with disability in the workplace</p> <p>BSBXDB502 Adapt organisations to enhance accessibility for people with disability</p> <p>BSBXTW301 Work in a team</p> <p>BSBXTW401 Lead and facilitate a team</p> <p>Qualifications</p> <p>Update to elective units within eight qualifications:</p> <p>BSB30115 Certificate III in Business</p> <p>BSB30215 Certificate III in Customer Engagement</p> |

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| | | BSB40215 Certificate IV in Business BSB41015 Certificate IV in Human Resources BSB42015 Certificate IV in Leadership and Management BSB50215 Diploma of Business BSB50618 Diploma of Human Resources Management BSB51918 Diploma of Leadership and Management |
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| Release 3.0 | September 2018 | Qualifications Update to core units within eight qualifications: BSB41618 Certificate IV in Business (Procurement) BSB42518 Certificate IV in Small Business Management BSB42618 Certificate IV in New Small Business BSB50618 Diploma of Human Resources Management BSB51518 Diploma of Business (Procurement) BSB51918 Diploma of Leadership and Management BSB52318 Diploma of Governance BSB61218 Advanced Diploma of Program Management Units of Competency Seven new units of competency: BSBCRT404 Apply advanced critical thinking to work processes BSBCRT502 Develop critical thinking in others BSBITU501 Conduct data analysis BSBPRC406 Conduct e-procurement BSBPRC505 Manage ethical procurement BSBWRK311 Develop self-awareness BSBWRK412 Contribute to personal development Updates to 41 units of competency to align content with industry skills needs and standards: BSBEBU511 Develop and implement an e-business |

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| | | <p>strategy</p> <p>BSBFIA412 Report on financial activity</p> <p>BSBITA411 Design and develop relational databases</p> <p>BSBITA611 Configure and optimise customer contact technology</p> <p>BSBITB511 Establish and maintain a network of digital devices</p> <p>BSBITS411 Maintain and implement digital technology</p> <p>BSBITU111 Operate a personal digital device</p> <p>BSBITU112 Develop keyboard skills</p> <p>BSBITU211 Produce digital text documents</p> <p>BSBITU212 Create and use spreadsheets</p> <p>BSBITU213 Use digital technologies to communicate remotely</p> <p>BSBITU311 Use simple relational databases</p> <p>BSBITU312 Create electronic presentations</p> <p>BSBITU313 Design and produce digital text documents</p> <p>BSBITU314 Design and produce spreadsheets</p> <p>BSBITU315 Purchase goods and services online</p> <p>BSBITU422 Use digital technologies to collaborate in the workplace</p> <p>BSBLDR511 Develop and use emotional intelligence</p> <p>BSBLDR513 Communicate with influence</p> <p>BSBMKG534 Design effective digital user experiences</p> <p>BSBMKG535 Devise a search engine optimisation strategy</p> <p>BSBMKG536 Develop strategies to monetise digital engagement</p> <p>BSBMKG537 Develop a social media engagement plan</p> <p>BSBPMG621 Facilitate stakeholder engagement</p> <p>BSBPMG622 Implement program governance</p> <p>BSBPMG623 Manage benefits</p> <p>BSBPMG624 Engage in collaborative alliances</p> <p>BSBPRC401 Plan procurement</p> |
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| | | <p>BSBPRC402 Negotiate contracts</p> <p>BSBPRC403 Conduct international procurement</p> <p>BSBPRC501 Manage procurement strategies</p> <p>BSBPRC502 Manage supplier relationships</p> <p>BSBPRC503 Manage international procurement</p> <p>BSBPRC504 Manage a supply chain</p> <p>BSBRES411 Analyse and present research information</p> <p>BSBSMB420 Evaluate and develop small business operations</p> <p>BSBSMB421 Manage small business finances</p> <p>BSBSMB422 Plan small business growth</p> <p>BSBSMB423 Create a digital technology plan for small business</p> <p>BSBWOR424 Develop a time management plan</p> <p>BSBWKR520 Manage employee relations</p> |
| Release 2.0 | January 2016 | <p>Includes review of the following sectors:</p> <p>Sustainability (1 new qualification and 6 new units)</p> <p>Governance (1 new qualification and 9 new units)</p> <p>Marketing and Advertising (3 new qualifications and 12 new units)</p> <p>Small Business (2 new qualifications and 6 new units)</p> <p>One new skill set to meet industry requirements:</p> <p>BSBSS00089 Workplace Innovation Skill Set</p> <p>The following qualifications have been moved from CUL11 Library, Information and Cultural Services Training Package version 1 to BSB Business Services Training Package version 2 and have been updated to meet the Standards for Training Packages:</p> <p>CUL30111 Certificate III in Information and Cultural Services</p> <p>CUL40111 Certificate IV in Library, Information and Cultural Services</p> <p>CUL50111 Diploma of Library and Information Services</p> |

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| | | <p>The following qualifications have been moved from TAE10 Training and Education Training Package version 3.4 to BSB Business Services Training Package version 2 and have been updated to meet the Standards for Training Packages:</p> <p>TAE70210 Graduate Certificate in Management (Learning)</p> <p>TAE80210 Graduate Diploma of Management (Learning)</p> <p>Industry Skills Council (ISC) upgrade to update unit lists and correct typographical errors</p> |
| Release 1.2 | June 2015 | Industry Skills Council (ISC) upgrade to correct typographical errors |
| Release 1.1 | April 2015 | Industry Skills Council (ISC) upgrade to correct mapping and typographical errors |
| Release 1.0 | March 2015 | <p>Primary release of restructured Training Package</p> <p>This release of the BSB Business Services Training Package contains 61 qualifications, 305 skill sets and 563 native units of competency (comprising 523 units updated to meet Standards for Training Packages and 40 new units) and 73 imported units</p> <p>Leadership and Management qualifications added</p> <p>Managing Diversity qualification added</p> <p>Portfolio Management qualifications added</p> <p>Conveyancing qualifications moved from FNS10</p> |

Credit Arrangements

Credit Arrangements for BSB Training Package Version 7

At the time of endorsement of this Training Package no national credit arrangements exist for the BSB Training Package.

Links

Companion Volume Implementation Guide:

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| | https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10 |
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Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

BSBSS00091 Capture and Present Big Data Skill Set

Modification History

| Release | Comment |
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| Release 1 | This version first released with BSB Business Services Training Package Version 6.0. |

Description

This skill set addresses the skills and knowledge to capture, analyse and present big data from one or more sources for a range of purposes in a broad range of workplaces and industries.

Pathways Information

The units provide credit towards qualifications in the BSB Business Services Training Packages.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBXBD401 Capture and store big data

BSBXBD402 Test big data samples

BSBXBD403 Analyse big data

BSBXBD406 Present big data insights

Target Group

This skill set applies to those working in a broad range of industries who as part of their job are responsible for the operational use of big data.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Packages meet industry requirements for those required to capture and present big data.

BSBSS00092 Manage Big Data Skill Set

Modification History

| Release | Comment |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 6.0. |

Description

This skill set addresses the skills and knowledge to manage big data for a range of purposes in a broad range of workplaces and industries.

Pathways Information

The units provide credit towards qualifications in the BSB Business Services Training Packages.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBXBD405 Develop procedures for managing big data

BSBXBD407 Protect big data integrity

BSBXBD408 Implement and review procedures for managing big data

Target Group

This skill set applies to those working in a broad range of industries who as part of their job are responsible for managing big data.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Packages meet industry requirements for those required to manage big data.

BSBSS00093 Cyber Security Threat Assessment and Risk Management Skill Set

Modification History

| Release | Comment |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 6.0. |

Description

This skill set addresses the skills and knowledge to engage with assessment of cyber threats to an organisation and the management of the identified threats, across a broad range of industries.

Pathways Information

The units provide credit towards qualifications in the Business Services Training Packages.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBXCS403 Contribute to cyber security threat assessments

BSBXCS404 Contribute to cyber security risk management

Target Group

This skill set applies to those working in a broad range of industries who as part of their job role contribute to cyber security threat assessments and cyber security risk management.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Packages meet industry requirements for those required to contribute to cyber security threat assessments and risk management.

BSBSS00094 Cyber Security Awareness Skill Set

Modification History

| Release | Comment |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 6.0. |

Description

This skill set addresses the skills and knowledge to assist an organisation improve cyber threat awareness and protect against cyber risk across a broad range of industries.

Pathways Information

The units provide credit towards qualifications in the BSB Business Services Training Packages.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBXCS301 Protect own personal online profile from cyber security threats

BSBXCS302 Identify and report online security threats.

BSBXCS303 Securely manage personally identifiable information and workplace information

BSBXCS402 Promote workplace cyber security awareness and best practices

Target Group

This skill set applies to those working in a broad range of industries who as part of their job role engage in cyber security threat assessments and protection against cyber security risk.

Suggested words for Statement of Attainment

These units of competency from BSB Business Services Training Packages meet industry requirements for those required to assist in raising cyber security awareness with organisations.

BSBSS00095 Cross-Sector Infection Control Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 6.1. |

Description

This skill set addresses the skills and knowledge required to undertake work activities in compliance with organisational procedures that prevent and control infection.

For information on delivery and associated job roles, please refer to the relevant Companion Volume Implementation Guide and RTO Guidance available on VETNet.

Pathways Information

Achievement of this unit of competency provides credit towards the Certificate III in Work Health and Safety, the Certificate III in Business and other qualifications that allow for selection of this unit of competency.

Licensing/Regulatory Information

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Skill Set Requirements

BSBWHS332X Apply infection prevention and control procedures to own work activities

Target Group

This skill set is for workers in all industries who require the skills and knowledge to reduce the risk and transmission of infection while carrying out routine work activities in their job role.

Suggested words for Statement of Attainment

This unit of competency from the BSB Business Services Training Package provides the skills and knowledge required to follow infection prevention and control procedures in the workplace.

BSBSS00096 Innovation Practice Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to support innovative practices for a range of purposes required within or external to an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB40120 Certificate IV in Business (Leadership, Business Operations) and BSB40320 Certificate IV in Entrepreneurship and New Business.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBCRT411 Apply critical thinking to work practices

BSBCRT413 Collaborate in creative processes

BSBCRT512 Originate and develop concepts

BSBSTR402 Implement continuous improvement

Target Group

This skill set is for individuals who are required to use critical thinking and creative processes to innovate in a broad range of contexts.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for using innovation practices in a broad range of contexts.

BSBSS00097 Innovation Leadership Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to lead innovation for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50120 Diploma of Business (Organisational Development).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBPMG531 Manage project time

BSBSTR501 Establish innovative work environments

BSBSTR601 Manage innovation and continuous improvement

Target Group

This skill set is for individuals who as part of their job lead innovation practices within a work environment for an organisation or work area.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for leading innovation for an organisation or work area.

BSBSS00098 Marketing Foundations Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to assist basic marketing functions for a range of purposes required within a marketing context.

Pathways Information

Units from this skill set can contribute to credit towards BSB40120 Certificate IV in Business (Leadership, Business Operations) and BSB40820 Certificate IV in Marketing and Communication.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBCRT412 Articulate, present and debate ideas

BSBCRT413 Collaborate in creative processes

BSBMKG431 Assess marketing opportunities

BSBMKG434 Promote products and services

Target Group

This skill set is for individuals working within an organisation who as part of their job role provide support in basic marketing functions.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for supporting basic marketing functions within organisations.

BSBSS00099 Communications and Public Relations Foundations Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to assist communications and public relations functions for a range of purposes required by an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB40820 Certificate IV in Marketing and Communication.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBMKG439 Develop and apply knowledge of communications industry

BSBMKG440 Apply marketing communication across a convergent industry

BSBMKG441 Develop public relations documents

Target Group

This skill set is for individuals who work in an organisation and assist the communications and public relations functions.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for foundational communications and public relations skills required in an organisation.

BSBSS00100 Business Operations Support Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to support business operations for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB40320 Certificate IV in Entrepreneurship and New Business and BSB40520 Certificate IV in Business (Business Operations).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBESB401 Research and develop business plans

BSBFIN401 Report on financial activity

BSBOPS401 Coordinate business resources

BSBOPS402 Coordinate business operational plans

BSBOPS403 Apply business risk management processes

Target Group

This skill set is for individuals who are required to support business operations within a business environment.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals who are required to support business operations in an organisation.

BSBSS00101 Business Operations Management Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to manage business operations for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50120 Diploma of Business (Business Operations).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBFIN501 Manage budgets and financial plans

BSBOPS501 Manage business resources

BSBOPS504 Manage business risk

BSBOPS601 Develop and implement business plans

BSBST503 Develop organisational policy

Target Group

This skill set is for individuals who are required to manage business operations within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for managing business operations in an organisation.

BSBSS00102 Micro Business Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to investigate and plan a micro business for a range of purposes required within or external to an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB40320 Certificate IV in Entrepreneurship and New Business.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBESB301 Investigate business opportunities

BSBESB401 Research and develop business plans

Target Group

This skill set is for individuals who investigate and plan a micro business within or external to an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for investigating and planning a micro business in or external to an organisation.

BSBSS00103 New Business Ventures Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to plan and develop new business ventures for a business generating self-employment, or for an existing organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB30220 Certificate III in Entrepreneurship and New Business.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBESB301 Investigate business opportunities

BSBESB302 Develop and present business proposals

BSBESB303 Organise finances for new business ventures

BSBESB304 Determine resource requirements for new business ventures

Target Group

This skill set is for individuals who are starting a new business venture within or external to an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for establishing a new business venture generating self-employment, or for an existing organisation

BSBSS00104 Small Business Management Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to manage a small business for a range of purposes required within a small business context.

Pathways Information

Units from this skill set can contribute to credit towards BSB40320 Certificate IV in Entrepreneurship and New Business.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBESB401 Research and develop business plans

BSBESB403 Plan finances for new business ventures

BSBESB405 Manage compliance for small businesses

BSBESB407 Manage finances for new business ventures

Target Group

This skill set is for individuals who are required to manage a small business.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for small business management.

BSBSS00105 Human Resources Foundations Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to assist the human resources function in an organisation as well as meeting the entrance requirements for the BSB50320 Diploma of Human Resource Management.

Pathways Information

Units from this skill set can contribute to credit towards BSB40420 Certificate IV in Human Resources.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBHRM411 Administer performance development processes

BSBHRM412 Support employee and industrial relations

BSBHRM415 Coordinate recruitment and onboarding

BSBHRM417 Support human resource functions and processes

Target Group

This skill set is for individuals who assist the human resources function within an organisation as well as those seeking to satisfy the Entry Requirements for BSB50320 Diploma of Human Resource Management.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for an individual who assists the human resources function in an organisation.

BSBSS00106 Introduction to Paralegal Services Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to support paralegal services within a legal services environment as well as meeting the entrance requirements for BSB50720 Diploma of Paralegal Services.

Pathways Information

Units from this skill set can contribute to credit towards BSB40620 Certificate IV in Legal Services.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBLEG314 Protect information in a legal services environment

BSBLEG423 Conduct simple legal research

BSBLEG424 Support the drafting of complex legal documents

Target Group

This skill set is for individuals who are required to support paralegal services within a legal services environment as well as those seeking to satisfy the Entry Requirements for BSB50720 Diploma of Paralegal Services.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for an individual who supports paralegal services in legal services contexts.

BSBSS00107 Marketing and Communication Foundations Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to support marketing and communications for a range of purposes required within an organisation as well as meeting the entrance requirements for the BSB50620 Diploma of Marketing and Communication.

Pathways Information

Units from this skill set can contribute to credit towards BSB40820 Certificate IV in Marketing and Communication.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBCMM411 Make presentations

BSBCRT412 Articulate, present and debate ideas

BSBMKG433 Undertake marketing activities

BSBMKG435 Analyse consumer behaviour

BSBMKG439 Develop and apply knowledge of communications industry

BSBWRT411 Write complex documents

Target Group

This skill set is for individuals who are required to support marketing and communications within an organisation and/or must satisfy the Entry Requirements for BSB50620 Diploma of Marketing and Communication.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for an individual who supports marketing and communications in an organisation.

BSBSS00108 Marketing and Communication Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to undertake marketing and communications for a range of purposes required within an organisation as well as meeting the entrance requirements for BSB60520 Advanced Diploma of Marketing and Communication.

Pathways Information

Units from this skill set can contribute to credit towards BSB50620 Diploma of Marketing and Communication.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBMKG541 Identify and evaluate marketing opportunities

BSBMKG542 Establish and monitor the marketing mix

BSBMKG552 Design and develop marketing communication plans

BSBMKG555 Write persuasive copy

BSBPMG430 Undertake project work

Target Group

This skill set is for individuals who are required to undertake marketing and communications within an organisation as well as those seeking to satisfy the Entry Requirements for BSB60520 Advanced Diploma of Marketing and Communication.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for an individual who undertakes marketing and communications in an organisation.

BSBSS00109 Introduction to Team Management Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge required for an individual entering a team management role within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50420 Diploma of Leadership and Management.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBCMM511 Communicate with influence

BSBLDR522 Manage people performance

BSBPMG534 Manage project human resources

BSBXTW401 Lead and facilitate a team

Target Group

This skill set is for individuals who are entering a team management position for the first time within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for a new team manager in an organisation.

BSBSS00110 Business Development Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to undertake business development activities for an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50120 Diploma of Business (Business Development) and BSB50620 Diploma of Marketing and Communication.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBMKG541 Identify and evaluate marketing opportunities

BSBMKG548 Forecast international market and business needs

BSBTWK401 Build and maintain business relationships

SIRXMGT005 Lead the development of business opportunities

Target Group

This skill set is for individuals who are required to engage in business development within an organisation.

Suggested words for Statement of Attainment

These units of competency meet industry requirements for an individual who undertakes business development.

BSBSS00111 Human Resources Advisor Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to coordinate human resource functions for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50320 Diploma of Human Resource Management.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBHRM522 Manage employee and industrial relations

BSBHRM525 Manage recruitment and onboarding

BSBHRM526 Manage payroll

BSBHRM527 Coordinate human resource functions and processes

BSBHRM528 Coordinate remuneration and employee benefits

Target Group

This skill set is for individuals who are required to coordinate human resource functions within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for an individual who is required to coordinate human resource functions in an organisation.

BSBSS00112 Workplace Technology Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the introductory skills and knowledge to use workplace technology for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB30120 Certificate III in Business (Technology).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBTEC203 Research using the internet

BSBTEC301 Design and produce business documents

BSBTEC302 Design and produce spreadsheets

BSBTEC303 Create electronic presentations

Target Group

This skill set is for individuals who may be entering the workforce or changing job roles and require basic technology skills.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for using basic technology skills in a workplace environment.

BSBSS00113 Digital Business Administration Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to use digital technology in a business administration role for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB40120 Certificate IV in Business (Business Administration).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBTEC401 Design and produce complex text documents

BSBTEC402 Design and produce complex spreadsheets

BSBTEC403 Apply digital solutions to work processes

BSBTEC404 Use digital technologies to collaborate in a work environment

Target Group

This skill set is for individuals who use digital technology in the workplace, particularly in a business administration role.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for an individual who is required to use technology in business administration roles.

BSBSS00114 Organisational Governance Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to uphold effective organisational governance practices within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB60120 Advanced Diploma of Leadership and Management.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBLDR602 Provide leadership across the organisation

BSBOPS602 Monitor corporate governance activities

BSBPMG539 Manage project governance

Target Group

This skill set is for individuals who are required to lead an organisation and manage project governance in a business environment.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for upholding effective organisational governance practices.

BSBSS00115 Copyright Management Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to manage copyright compliance for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB60120 Advanced Diploma of Business.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBAUD601 Establish and manage compliance management systems

BSBINS503 Monitor compliance with copyright and licence requirements

BSBLEG522 Apply legal principles in contract law matters

BSBOPS501 Manage business resources

Target Group

This skill set is for individuals who are required to manage and monitor copyright compliance within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for copyright management in an organisation.

BSBSS00116 Campaign Management Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to manage advertising and public relations campaigns for a range of purposes required within a marketing context.

Pathways Information

Units from this skill set can contribute to credit towards BSB60520 Advanced Diploma of Marketing and Communication.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBMKG553 Develop public relations campaigns

BSBMKG626 Develop advertising campaigns

BSBMKG627 Execute advertising campaigns

Target Group

This skill set is for individuals who are required to manage advertisement and public relations campaigns within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for an individual that manages advertising and public relations campaigns in an organisation.

BSBSS00117 Diversity and Inclusion Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to lead the development and implementation of diversity and inclusion (D&I) practices for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50120 Diploma of Business (Leadership) and BSB60420 Advanced Diploma of Leadership and Management.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBHRM615 Contribute to the development of diversity and inclusion strategies

BSBLDR521 Lead the development of diverse workforces

BSBTWK501 Lead diversity and inclusion

Target Group

This skill set is for individuals who are required to lead and contribute to the development of a diverse workforce.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals who are required to lead the development and implementation of diversity and inclusion (D&I) practices for an organisation.

BSBSS00118 Procurement Manager Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to manage procurement for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50120 Diploma of Business (Procurement).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBPMG537 Manage project procurement

BSBPRC501 Manage procurement strategies

BSBPRC502 Manage supplier relationships

BSBPRC504 Manage a supply chain

BSBPRC505 Manage ethical procurement strategy

Target Group

This skill set is for individuals who are required to manage procurement within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals who are required to manage procurement within an organisation.

BSBSS00119 Customer Service Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to provide customer service for an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB30120 Certificate III in Business (Customer and Client Engagement).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBOPS304 Deliver and monitor a service to customers

BSBOPS305 Process customer complaints

SIRXCEG002 Assist with customer difficulties

SIRXPDK001 Advise on products and services

Target Group

This skill set is for individuals who are required to provide customer service for an organisation.

Suggested words for Statement of Attainment

These units of competency meet industry requirements for individuals who are required to assist and provide service to customers for an organisation.

BSBSS00120 Administrative Assistant Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to assist administrative functions for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB30120 Certificate III in Business (Business Administration).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBFIN302 Maintain financial records

BSBOPS301 Maintain business resources

BSBOPS303 Organise schedules

BSBPUR301 Purchase goods and services

Target Group

This skill set is for individuals who are required to perform and assist with administrative tasks within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals who are required to assist administrative functions in a workplace.

BSBSS00121 Medical Administration Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to perform administrative functions for a range of purposes required in a medical environment.

Pathways Information

Units from this skill set can contribute to credit towards BSB30120 Certificate III in Business (Medical Administration).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBMED301 Interpret and apply medical terminology appropriately

BSBMED302 Prepare and process medical accounts

BSBMED303 Maintain patient records

BSBMED304 Assist in controlling stocks and supplies

BSBMED305 Apply the principles of confidentiality, privacy and security within the medical environment

BSBMED401 Manage patient record keeping system

Target Group

This skill set is for individuals who are required to perform administrative functions for a range of purposes required in a medical environment.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals who are required to perform administrative functions in a medical environment.

BSBSS00122 Compliance Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to interpret, evaluate and work within compliance frameworks within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50920 Diploma of Quality Auditing.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBAUD412 Work within compliance frameworks

BSBAUD514 Interpret compliance requirements

BSBAUD515 Evaluate and review compliance

Target Group

This skill set is for individuals who are required to work within compliance frameworks and evaluate compliance within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals who are required to work within compliance frameworks and evaluate compliance within an organisation.

BSBSS00123 Records and Information Management Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to support information and records management for a range of purposes required within an organisation.

Pathways Information

Units from this skill set can contribute to credit towards BSB50120 Diploma of Business (Records and Information Management) and BSB50520 Diploma of Library and Information Services.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBINS501 Implement information and knowledge management systems

BSBINS504 Maintain digital repositories

BSBINS512 Monitor business records systems

BSBINS513 Contribute to records management framework

BSBINS514 Contribute to records retention and disposal schedule

BSBINS601 Manage knowledge and information

Target Group

This skill set is for individuals who are required to support information and records management within an organisation.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals who are required to support information and records management in an organisation.

BSBSS00124 Workplace IT Foundations Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to prepare to use basic technology in the workplace.

Pathways Information

Units from this skill set can contribute to credit towards BSB10120 Certificate I in Workplace Skills and BSB20120 Certificate II in Workplace Skills.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBOPS101 Use business resources

BSBTEC101 Operate digital devices

FSKDIG002 Use digital technology for routine and simple workplace tasks

ICTICT211 Identify and use basic current industry specific technologies

Target Group

This skill set is for individuals who are preparing to enter the workplace.

Suggested words for Statement of Attainment

These units of competency meet industry requirements for individuals who are preparing to enter the workforce.

BSBSS00125 Workplace Foundations Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to prepare to enter the workforce.

Pathways Information

Units from this skill set can contribute to credit towards BSB10120 Certificate I in Workplace Skills and BSB20120 Certificate II in Workplace Skills.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBPEF101 Plan and prepare for work readiness

BSBWHS211 Contribute to the health and safety of self and others

FSKLRG011 Use routine strategies for work-related learning

FSKOCM006 Use oral communication skills to participate in workplace teams

Target Group

This skill set is for individuals who are preparing to enter the workforce.

Suggested words for Statement of Attainment

These units of competency meet industry requirements for individuals who are preparing to enter the workforce.

BSBSS00126 Contact Centre Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to work in a customer service contact centre under supervision of a manager or team leader.

Pathways Information

Units from this skill set can contribute to credit towards BSB20120 Certificate II in Workplace Skills and BSB30120 Certificate III in Business (Technology, Customer and Client Engagement).

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBDAT201 Collect and record data

BSBTEC202 Use digital technologies to communicate in a work environment

SIRXCEG002 Assist with customer difficulties

SIRXPDK001 Advise on products and services

Target Group

This skill set is for individuals who are working in a customer service contact centre position.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals who are working in a customer service contact centre.

BSBSS00127 Contact Centre Team Manager Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to manage a team in a customer service contact centre.

Pathways Information

Units from this skill set can contribute to credit towards BSB50120 Diploma of Business and BSB50420 Diploma of Leadership and Management.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBCMM412 Lead difficult conversations

BSBOPS404 Implement customer service strategies

BSBTWK502 Manage team effectiveness

SIRXCEG004 Create a customer-centric culture

Target Group

This skill set is for individuals who are managing a team in a customer service contact centre.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for individuals managing a team in a customer service contact centre.

BSBSS00128 Lead Auditor Skill Set

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 7.0. |

Description

This skill set addresses the skills and knowledge to lead a quality audit in a broad range of industries.

Pathways Information

Units from this skill set can contribute to credit towards BSB50920 Diploma of Quality Auditing.

Licensing/Regulatory Information

No licensing, legislative or certification requirements apply to this skill set at the time of publication.

Skill Set Requirements

BSBAUD411 Participate in quality audits

BSBAUD511 Initiate quality audits

BSBAUD512 Lead quality audits

BSBAUD513 Report on quality audits

Target Group

This skill set is for individuals who as part of their job role lead audits within a range of industries.

Suggested words for Statement of Attainment

These units of competency from the BSB Business Services Training Package meet industry requirements for leading an audit in a range of industries.

