



Australian Government

Department of Education, Employment and Workplace Relations

BSBATSIM416A Oversee organisational planning

Revision Number: 1

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Modification History

Not applicable.

Unit Descriptor

Unit descriptor	<p>This unit describes the performance outcomes, skills and knowledge required to oversee the development of plans that guide the operations of the organisation.</p> <p>Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.</p>
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Application of the Unit

Application of the unit	<p>This unit applies to individuals who are responsible for monitoring, guiding and planning the activities of Aboriginal and Torres Strait Islander organisations.</p>
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.
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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.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Gather relevant planning information	<p>1.1. Consult with community to identify needs, issues, visions and interests</p> <p>1.2. Identify people with appropriate expertise both within and outside the organisation who could assist the planning process</p> <p>1.3. Identify and obtain relevant planning information, including the organisation's current provision of services</p> <p>1.4. Review the effectiveness of this provision in terms of meeting organisational and community needs</p>
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 the 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 the type of planning activity required to meet the needs of the organisation</p> <p>2.5. Identify the key purpose and essential components of the planning activity</p> <p>2.6. Clarify the 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 that promote 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 the 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>

ELEMENT	PERFORMANCE CRITERIA
	4.5.Ensure plans include risk management strategies 4.6.Ensure plans include consideration of <i>sustainability</i> 4.7.Monitor plan development and adjust where appropriate
5. Approve plans	5.1.Work with other board members to approve agreed plan for implementation 5.2.Communicate approved plans to the community

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to review current organisational services and existing plans
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills to monitor and review information presented to the board and enact planning decisions
- numeracy skills to understand relevant numerical data
- oral or written communication skills to be able to gather and share information
- organisational and planning skills to ensure that plans that meet the vision, goals and objectives of the organisation are developed in a timely manner
- problem-solving skills to deal with planning information which is contradictory, ambiguous, inconsistent or inadequate
- research skills to identify and access planning information
- teamwork skills to develop plans cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders

Required knowledge

- board processes for decision making
- concept of community control of organisations and how it may impact on organisational planning
- 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 on organisational planning
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on organisational planning
- methods for community consultation and engagement
- methods for setting vision, goals and objectives
- organisation review processes, such as a SWOT analysis
- potential funding sources to support organisational goals and objectives
- principles of risk management relevant to organisational planning
- provisions of federal, state or territory legislation and funding body requirements that influence decisionmaking and may impact on organisational planning
- relevant organisational planning concepts
- relevant principles of sustainability
- relevant protocols and cultural responsibilities with respect to planning
- roles and responsibilities of board and management in organisational planning

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	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	<p>Evidence of the ability to:</p> <ul style="list-style-type: none"> develop plans that are consistent with community needs, cultural requirements and organisational directions identify and access information relevant to planning activity identify risk management and sustainability strategies oversee organisational planning.
Context of and specific resources for assessment	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> access to examples of organisational plans knowledge and performance is assessed over time to confirm consistency in performance participation on an actual or simulated board.
Method of assessment	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> analysis of planning information and documentation direct questioning combined with reflection practical board performance by the candidate analysis of responses to case studies and scenarios demonstration of techniques observation of presentations oral or written questioning to assess knowledge of planning processes observation of performance in role plays performance of board duties or an accurate simulation of board duties.
Guidance information for assessment	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> BSBAT411C Communicate with the community

EVIDENCE GUIDE

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| | <ul style="list-style-type: none">• BSBATSIM417A Implement organisational plans• BSBRES401A Analyse and present research information. |
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Range Statement

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>Community</i> may include:	<ul style="list-style-type: none"> • community members • Elders • members of the organisation • other Aboriginal and Torres Strait Islander organisations • other relevant stakeholders • traditional owners.
<i>Relevant planning information</i> may include:	<ul style="list-style-type: none"> • existing organisational plans • community and stakeholder feedback • funding and resource opportunities • market research • organisational documentation, such as: <ul style="list-style-type: none"> • annual general report • constitution • financial reports and budgets • networks and supporters • policy and procedures • vision and purpose statements • relevant data and statistics • relevant government reports, strategic directions, and policy • staff skills and capabilities.
<i>Review</i> may involve:	<ul style="list-style-type: none"> • community and stakeholder feedback • evaluation reports • gap analysis • market research • SWOT analysis.
<i>Planning activity</i> may include:	<ul style="list-style-type: none"> • action plans • business plans • cultural plans • financial plans • marketing and promotion plans

RANGE STATEMENT	
	<ul style="list-style-type: none"> • staffing plans • strategic plans.
<i>Cultural identity</i> may include:	<ul style="list-style-type: none"> • common cultural values that underpin Aboriginal and Torres Strait Islander people • diversity and uniqueness of individual communities • languages, songs, arts and artwork • Native Title status and issues • relationship with the land.
<i>Cultural requirements</i> may include:	<ul style="list-style-type: none"> • cultural protocols • recognition of diversity.
<i>Protocols that promote cultural respect</i> may include:	<ul style="list-style-type: none"> • community processes of consultation • local traditions and customs • recognition of Elders and traditional owners • respect and courtesy to other communities • rights of others, rights of privacy, and secret business.
<i>Plan development process</i> may include:	<ul style="list-style-type: none"> • consultation with community and key stakeholders • feedback from community and key stakeholders.
<i>Resources</i> may include:	<ul style="list-style-type: none"> • board member support • development of working group or subcommittee • external consultants • finances • identified partnerships • information and communication technologies • network contacts • planning expertise • staff.
<i>Legal and compliance requirements</i> may include:	<ul style="list-style-type: none"> • contractual requirements • management of occupational health and safety • reporting requirements.
<i>Financial targets and funding requirements</i> may include:	<ul style="list-style-type: none"> • budget • financial obligations • financial viability • funding and service agreements • possible funding options.

RANGE STATEMENT*Sustainability* may include:

- cultural factors
- economic factors
- environmental factors
- social factors.

Unit Sector(s)**Unit sector****Competency field****Competency field**

Regulation, licensing and risk - ATSI governance

Co-requisite units**Co-requisite units**