



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **BSBATSIW416C Obtain and manage consultancy services**

**Revision Number: 1**

## BSBATSIW416C Obtain and manage consultancy services

### Modification History

Not applicable.

### Unit Descriptor

<b>Unit descriptor</b>	<p>This unit describes the performance outcomes, skills and knowledge required to obtain and manage consultancy services.</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

<b>Application of the unit</b>	<p>This unit applies to individuals who are responsible for obtaining and managing external experts to assist in the activities of the organisation.</p>
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### Licensing/Regulatory Information

Not applicable.

### Pre-Requisites

<b>Prerequisite units</b>		

## Employability Skills Information

<b>Employability skills</b>	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. Establish the need for external advice	1.1. Identify required <i>expertise</i> not available in 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 <i>terms of reference</i> (consultancy brief) for consultant services 2.3. Identify and include opportunities for paid community involvement where appropriate
3. Select a consultant	3.1. Advertise terms of reference for the consultancy 3.2. Establish a process for short listing, including appointment of a selection panel 3.3. Select the most suitable applicant according to the organisation's requirements, policies and procedures 3.4. Ensure successful and unsuccessful applicants are advised of the outcome and provided with feedback 3.5. Ensure appropriate procedures are in place to document the selection process and outcome
4. Develop a contract	4.1. Obtain legal advice on contract requirements 4.2. Ensure a draft contract is prepared in accordance with legal advice that outlines what is required of the consultant
5. Brief the consultant	5.1. Clarify the board's requirements with the consultant 5.2. Negotiate final details of the project with the consultant, including expectations of performance and outcomes 5.3. Ensure the contract is finalised and signed 5.4. Familiarise the consultant with the organisation and its personnel
6. Monitor consultant's performance	6.1. Check that 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

ELEMENT	PERFORMANCE CRITERIA
	requirements have been met

## Required Skills and Knowledge

### REQUIRED SKILLS AND KNOWLEDGE

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

#### Required skills

- communication, teamwork and negotiation skills to work cooperatively with consultants, other board members, management and staff of the organisation, members, community and key stakeholders
- communication skills to provide feedback on performance
- 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 decisions
- problem-solving skills to identify and manage performance issues
- organisational and planning skills to plan project and costings

#### Required knowledge

- concept of community control of organisations and how it may have an impact on the selection of a consultant
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how this might have an impact on the selection of a consultant
- development and typical content of terms of reference, milestones and performance indicators
- equity and diversity principles as they apply to selecting consultants
- external skill or competency needs required by the organisation
- forms of contract and contractual obligations for consultants
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the selection of a consultant
- recruitment and selection processes in relation to obtaining consultancy services
- relevant protocols and cultural responsibilities when engaging a consultant
- sources of legal advice available and how they can be accessed

## Evidence Guide

<b>EVIDENCE GUIDE</b>	
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.	
<b>Overview of assessment</b>	
<b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b>	<p>Evidence of the ability to:</p> <ul style="list-style-type: none"> <li>• obtain appropriate consultancy services that meet legal and organisational requirements</li> <li>• monitor and review consultant's performance against relevant criteria</li> <li>• provide feedback on consultant's performance.</li> </ul>
<b>Context of and specific resources for assessment</b>	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>• participation on an actual or simulated board</li> <li>• access to examples of situations where boards may seek consultancy services</li> <li>• access to examples of relevant documents</li> <li>• knowledge and performance are assessed over time to confirm consistency in performance.</li> </ul>
<b>Method of assessment</b>	<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"> <li>• observation of performance on a board or simulated board</li> <li>• direct questioning combined with reflection of practical board performance by the candidate</li> <li>• analysis of responses to case studies and scenarios</li> <li>• observation of presentations and group discussions</li> <li>• oral or written questioning to assess knowledge</li> <li>• observation of performance in role plays</li> <li>• analysis of feedback from consultants, board members and staff regarding performance.</li> </ul>
<b>Guidance information for assessment</b>	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

## 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.

<b><i>Expertise:</i></b>	<ul style="list-style-type: none"> <li>• may include:             <ul style="list-style-type: none"> <li>• accounting</li> <li>• business development</li> <li>• community planning</li> <li>• legal</li> <li>• training</li> <li>• planning</li> <li>• research</li> </ul> </li> <li>• may involve:             <ul style="list-style-type: none"> <li>• evaluating services and procedures</li> <li>• solving major problems</li> <li>• writing submissions</li> <li>• writing policy and procedures.</li> </ul> </li> </ul>
<b><i>Terms of reference</i></b> may include:	<ul style="list-style-type: none"> <li>• community aims</li> <li>• community involvement</li> <li>• expenses</li> <li>• payment schedule</li> <li>• reporting requirements</li> <li>• required outcomes and key performance indicators</li> <li>• reviews</li> <li>• timelines.</li> </ul>

## Unit Sector(s)

<b>Unit sector</b>	
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## Competency field

<b>Competency field</b>	Regulation, licensing and risk - ATSI governance
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## Co-requisite units

<b>Co-requisite units</b>		